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ABSTRACT

Ideas on increasing personal and professional productivity for institutional advancement staff are provided in 25 articles. Techniques are outlined for getting organized, setting deadlines, delegating responsibilities, motivating staff members, and meeting the demands of one- or two-person compus offices. Some of the titles and authors of the articles include the following: "10 Ways to Increase Your Productivity" (Arthur V. Ciervo); "It's about Time: How to Make It and Manage It" (M. Fredric Volkmann); "Guidelines for Success in the Small Shop" (Wesley K. Willmer); "Rx for the Small Alumni Office: Try a Dose of Preventive Organization" (Patricia Szymczak); "Test Yourself! Use This Checklist to Assess the Strengths and Weaknesses of Your Fund-Raising Operation" (Charles H. Webb); "A Cast of Thousands: Recruit Everybody--Volunteers, Staff, Students, Faculty--to Make an Alumni Program Produce" (Elaine Prentice, Sally Rodgers); "Profiles in Productivity: 17 Great Supervisors on Getting More from Your Staff" (Anne Lowrey Bailey); "40 Carrots: To Motivate Employees, Try Listening to Their Needs" (Calvin H. Stoney); "Presto Chango! Watch Us Change a Student into a PR Assistant" (Jennifer Hamlin). (SW)

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How to Improve Your Productivity

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and Carolyn Said

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productivity

getting organized

10 WAYS TO INCREASE YOUR PRODUCTIVITY

BY ARTHUR V. CIERVO

Productivity, former Secretary of Labor James D. Hodgson once noted, has "all the pizzazz of a wet mop."

I disagree. Productivity can be exciting and personally rewarding, particularly at colleges and universities where survival in many ways depends on the ability to get results.

As a manager, I operate on the assumption that most of the people joining my staff have never produced beyond 60 percent of their capabilities. For that matter, there is a lot of unused capacity in each of us. But I don't adjust my expectations downward to suit the employee's working habits.

Instead, I try to improve his or her productivity to 80 percent of capacity. I assign an 80 percent work load, which requires 100 percent of the person's time, and then help the employee adjust to the increase. Through such an approach, staff members end up producing at least 20 percent more than most people in the PR field.

When I mention increasing productivity to busy people, they say, "That's crazy. I'm so overworked now that I don't see how I can possibly do more!"

Maybe so. But don't confuse the hours you work with the results you obtain.

If you want to be more effective, consider these 10 ways to increase productivity.

1. *Learn to use time better.* Few people (about 10 percent, according to some management consultants) have learned how to use time to their advantage. Unfortunately, *everyone* feels that he or she is in that 10 percent. For a more objective judgment, consider whether you have any of these symptoms of a time waster:

- feeling overwhelmed by work;
- working longer hours than necessary to get the job done;
- constantly blaming other people for failing to get things done;
- frequently failing to meet deadlines, or meeting them with a last-minute rush; and
- spending time telling people how busy you are.

Here are some specific time-*savers:*

- When you have an appointment away from the office, take with you a letter or two to answer, a report to read, or a magazine to skim. Then, if you have to wait, you can make the most of your time.
- Learn to make the most of other time-wasting moments. For example, while waiting for someone to come to the phone, write a note or read a letter.
- Put time to use at dull meetings. Sit near the door, and, when the meeting drags on, do some of your routine work—or thinking—as inconspicuously as possible. Or, escape early!

2. *Organize your work.* Organization simplifies our lives. Some people like to draw up a plan of action, listing in priority order duties to be performed during the course of the day. Then, they systematically do them. Resist the temptation to spread yourself, like an umbrella in a windstorm, in too many directions at one time.

One of the symptoms of a disorganized person is a cluttered desk. A couple of years ago while I was PR director at Georgetown, one of our Jesuits became president of a small college located in the same West Virginia town where I had once worked for a steel company. To help him get acquainted, I asked a friend at the company to introduce him to some of the top executives. A few months later, the Jesuit told me about those visits. While discussing a certain vice president, he said, "I don't know what that man does. Every time I go to his office, there's not a thing on his desk." I explained that perhaps the vice president was well organized. Lo and behold, a few months later, this clean-desk vice president became the president of the company!

Anything that comes across my desk is either acted upon immediately—this happens 90 percent of the time—or put into what I call my "fingertip" file. This folder contains items to which responses are pending. In this way, I take action before an item can be overlooked or become buried in a big filing cabinet.

3. *Keep it moving.* Respond to a request immediately if you can handle it without much research or involvement. I have a standing rule that all letters, including requests for publications, pictures, and information, must be answered the same day they come in.

At Georgetown, we had a "quick response" policy that meant even better service for the press. When a reporter called, we dropped whatever we were doing and, sometimes within seconds, fulfilled his or her request for information. We are now practicing "quick response" at Penn State.

4. *Delegate the work.* Sometimes we have the tendency to want to do everything ourselves when we could delegate responsibility to a lower paid, less-skilled employee—and thereby increase productivity. Some supervisors are reluctant to pass on responsibilities which they do well themselves. The result is often that supervisors cram 60 hours of work into 40-hour weeks while their employees cram 30 hours of work into 40-hour weeks.

One PR person informs me that he sometimes types his own letters and has the secretary do other work. That is a nice gesture. But, if we do it frequently, we should ask ourselves if we can't use our talents more effectively. List the duties of your operation, then decide what you have to do yourself. Assign the other duties.

5. *Expect and inspect.* These words are borrowed from Ben Groves of United Research Company who stresses that you should be sure to let a new employee know specifically what the duties are and what you expect. Then, check to make certain the work is being done efficiently and effectively. To quote Groves, "If you give a person the proper attention and follow up to see if the assignment has been accomplished, then higher productivity results."

Your motive should be to give positive reinforcement. Inspect what the

employee has done, praise his or her good work, but also make corrections if necessary.

6. *Set objectives.* Objectives help us to keep focused on what is important in our operations. Otherwise, we have a tendency to drift.

At the beginning of each school year, you and your staff should set down a list of hoped-for accomplishments, such as improving the school catalog or trimming the budget by 10 percent. Then, focus your main efforts on reaching those objectives.

Recently, at a workshop sponsored by the Women's College Coalition, 23 PR people listed 34 different duties required of them at their schools. These duties ranged from writing publicity to selling tickets and coaching a basketball team. If no one else wanted a duty, it was dumped onto the public relations staff. Interestingly, no one at the workshop mentioned performing the three most important public relations duties: consulting management in the decision-making process, doing research in problem solving, and playing the role of ombudsman, so as to solve problems before they turn into front-page stories. All of the PR people there had more than they could handle. But none apparently had considered the university's objectives.

7. *Insist upon deadlines.* After you discuss an item and make a decision on it, assign somebody to carry it out. Set a deadline. Failure to pin down specific targets and timetables leaves you retracing your steps – and wasting time.

It is also important to:

- Outline the interim steps to meet this deadline.
- Make certain that whomever is given responsibility for the assignment agrees that the interim steps can be accomplished, and the deadline can be met.

8. *Plan ahead.* It saves time to develop contingency plans and policies for emergency situations.

Our Georgetown policy, issued by the president, read in part: "In the event of a crime or controversy, as well as in routine matters, it is up to the public relations director to see that the media get the actual facts as quickly as humanly possible. Attempts to suppress bad news almost inevitably lead to unhappy consequences.

"... I therefore authorize the director of public relations, or designated members of his staff, to release information pertaining to emergencies, crimes, controversies, and other events to which the press has a reasonable claim. I ask that you keep him fully informed, both factually and promptly, about such activities in your area of responsibility."

This policy gave me the authority to release information, in most cases, without having to check constantly with sources. I could obtain information from sources quickly, without time-consuming hassles. I couldn't begin to count the hours of staff time this policy saved.

9. *Challenge yourself and your coworkers.* Some people are unproductive because their supervisors do not require them to do enough. I'm not talking about keeping people busy; I'm talking about getting results. It's up to you to create a climate that encourages productivity.

Any time you challenge a person to produce more than he or she has in any other job, you can expect some negative reactions, such as "This is too much for me to handle," "It's impossible," or "I'm overwhelmed." Simply explain that it can be done, and, if necessary, demonstrate how. If you ask more of an individual, while giving responsibility and expecting excellence, you will have unlocked the individual's unused energy and boosted productivity. Surprisingly, most people eventually learn how to increase their work capacity. Once they are more productive, they are also much happier with their job and themselves.

10. *Take a time-out.* No matter how busy you are, you need some quiet time to think things out and complete certain projects. This can't be accomplished with constant interruptions. Therefore, take a time-out, say for 30 or 45 minutes during the day, or if you are too busy, before or after regular working hours. Early morning, when I am at peak efficiency, is when I like to concentrate on doing a serious piece of writing or on handling the toughest problems. Setting aside special times for yourself will help you to keep matters in perspective, and, ultimately, to get more accomplished. CASE

TIME VALUE CHART

Based on 2,000 working hours per year (Fifty 40-hour weeks plus two weeks of vacation)

If you earn:	Every hour is worth:	Every minute is worth:	One hour per day for one year is worth:
$ 8,500	$ 4.25	$0.07	$1,062.50
10,000	5.00	.08	1,250
12,000	6.00	.10	1,500
15,000	7.50	.125	1,875
20,000	10.00	.17	2,500
25,000	12.50	.21	3,125
50,000	25.00	.42	6,250

Your time is valuable to you.

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IT'S ABOUT TIME

How to make it and manage it

BY M. FREDRIC VOLKMANN

A CASE friend of mine, perhaps one of the most organized people I know, once sent me a message she retrieved from a Chinese fortune cookie. It read, "If you can't command yourself, you can't command others." I don't know whether she was giving me a much-needed hint, but there can be no truer statement about effective management in higher education public relations.

To become hard-nosed, efficient, and respected managers of both ourselves and our offices, we must often sacrifice such qualities as gregariousness, affability, and the general image of being a good guy or gal. Instead, abrasiveness is the personality trait most commonly attributed to managers who improve programs. It is called Bucy's Law: "Nothing is ever accomplished by a reasonable person."

Bucy's Law does not suggest that we should be unreasonable. It implies we should not be so compromising that we allow talented staff and well-planned programs to slip away from their original goals or purposes.

Terman's Law focuses on the basis of all management problems: "If you want a track team to win the high jump, you find one person who can jump seven feet, not seven people who can each jump one foot." You must be the high jumper. You can't solve other people's management and production problems without first directing yourself and your own potential. You must be organized better than those around you — those who are constantly trying to take the one-foot jumps. Here are some tips that will help you spring into action:

M. Fredric Volkmann is director of public relations at Washington University, a private, coeducational institution of 10,000 students in St. Louis, Missouri. He tips his editorial hat to Malice in Blunderland *by Thomas L. Martin, Jr., published by McGraw-Hill Book Company. The maxims in this article are from that book.*

Tickle your files

Perhaps the most important tool in my work is something I call a tickle file. In reality, I have a rotten memory, but I have a system I learned 20 years ago that makes me appear to be a veritable genius at follow-up. (If they only knew the truth. . . .) Every morning, my secretary brings me a file folder with items in it dated for that morning. Some of those items were put in the tickle file months ago for review on a specific day in the future. My tickle file is an expandable file folder with 31 slots. (You can also set up a tickler system with certain word processors.) If I tell my secretary to tickle something on April 15, it goes in the slot numbered 15, as do all items for November 15, January 15, and so on. Into this file go copies of all memoranda, notes to myself, telephone calls that require follow-up — in fact, virtually anything that I need to do in the future.

Manage your mail

Another technique is to have someone go through your mail and organize it before it gets to you. I have always asked that my secretary open my mail, read it (unless it is marked "confidential"), and classify it as "Hot," "Warm," or "Cold." Obviously, hot mail requires my immediate attention. Cold mail usually consists of magazines and other publications I can read later.

I also have file folders labeled for "Drafts" (material that requires revision), "Signature Needed," "Tickle Items," and so on.

In addition, I have learned never to have a visible mailbox to add to the potential clutter on top of my desk. I always make a drawer in my desk accessible to my secretary. I divide it in half — one side labeled "In" and the other "Out." Once I have finished reading a piece of mail, it goes into the drawer so I don't have to deal with it again. More importantly, I don't have to look at a bundle of mail every time I look across my desk. The only shortcoming is that, when I get two feet of mail in the morning, I don't have a drawer deep enough to handle it.

Count on calendars

Appointment calendars are absolutely essential to a well-managed office. There are numerous ways of managing such calendars. They range from a simple daily page onto which you mark all appointments, to a multi-columned, hour-by-hour calendar for several people on the same staff, to special software packages on word processors. I prefer a calendar broken into 15-minute segments.

In addition, I do not believe in carrying a calendar with me. This helps me avoid any confusion that might result if I make entries independently of my secretary. I insist that she manage all of my appointments. Each night before I go home from work, she types up a small 3x5 card listing my appointments for the next day. I carry that card in my shirt pocket.

Some offices maintain separate calendars for the secretary and the boss, but my experience has been that they are often more confusing than they are helpful. Where one secretary works for several people, it's best to have a calendar with several columns on each day, with one column assigned to each staff person. Some offices that don't maintain calendars have sign-in, sign-out boards where each employee records his or her whereabouts and expected time of return.

Lean on lists

Another way to organize efficiently is to maintain production controls. The simplest production control mechanism I know of is the "to do" list. The best example I've seen is used by Robert L. O'Rourke, director of public relations at Boston University. He uses two approaches: "things to do today," and "things to do this week."

On his "today" list, he includes the date, slots for 12 tasks, and a check-off column for completed tasks. His weekly sheet lists the assignment or client, the activities to be done, status, and what to do in the coming week. With this combination, he and his staff have a handle on what's happening.

I use any sheet of scrap paper to write

down what I have to do each day. I paste it on a clipboard next to my desk or tape it to my bookcase.

Massage your messages

Another production-control technique is the use of telephone message forms. My secretary uses an excellent system that allows her to retain a carbon copy (should my copy be lost). It also gives me a way to doublecheck work done even a year or two ago.

Be a dictator

Unfortunately, most of us were trained to type out what we want to say and look at it, rather than to visualize it and verbalize it on tape. But you learn a great time-saving skill if you can give up your typewriter and use a dictation device or work with a stenographer.

Since most of us can't afford stenographers, we learn to use small dictation devices. You can use these anywhere — in the office, walking to meetings, in a car, and in airplanes. I learned to use a dictaphone in 1967-68. Previously, I was a hunt-and-peck typist who could bang out two or three short news releases an hour when the pressure was on. After I learned to use a dictaphone, my all-time record was 10 one-page news releases in 20 minutes. (Of course, it took my secretary an hour to transcribe them all.)

Carbon copy yourself

One important rule to remember on all typing, whether you do it or your secretary does it, is to buy a lifetime supply of onionskin parchment paper with throw-away carbon sheets. In my office, anything that goes into any typewriter must have one of these cartons attached. The uncorrected carbon is put into our "monthly file." This piece of paper serves as a backup to the original or to any Xerox copies that might become lost.

As any secretary who has worked with me can tell you, these carbons frequently have saved their lives — and mine. Even though these copies are not perfect, they preserve enough of the information to salvage the original message should all other copies become lost. I am never allowed to touch these carbons; they are kept in a permanent locked file. If you have a word processor with adequate on-line memory or easily storable diskettes, you can accomplish almost the same thing electronically.

Set ground rules

Another way to be organized is to set the ground rules before you begin any project. Virginia Carter Smith uses published ground rules when working with other CASE vice presidents and directors on publications and promotional mailings for seminars and conferences. She neatly and nicely states precisely what the individual should do and when. By setting such ground rules, she puts the responsibility for meeting deadlines squarely on the shoulders of those responsible for the programs involved.

Form 'see me' files

The "see me" or "let's discuss" file is a favorite tool of managers who have several persons reporting to them. These files work much like the tickle file, except they contain future action items relating to specific staff members. The system consists of a file for each staff member kept at the director's fingertips. Each file contains carbons of letters, copies of instructions, and notes. A manager usually pursues these items in a brief weekly meeting with the staff member involved.

This, then, forces a second major organizational practice: holding regular meetings, not only with subordinates but with bosses as well. I maintain a "let's discuss" file for each staff member and the vice chancellor. Because we meet regularly, there's no chance that items will sit in those files longer than seven days without action. Of course, we don't handle items requiring immediate action in this way.

Protect yourself

It's sometimes necessary to protect our interest in an effort to make ourselves and others more efficient.

A classic example is the memo that reads, "Attached is a manuscript (or news release) that demands your immediate attention. If I do not hear from you by June 15, 1984, I will presume it is correct as submitted and it will be published without change." Obviously, you don't want to use this technique often. Use it only with administrators who fail to act quickly or within prescribed deadlines.

Play the dating game

Make sure everything that comes into your office is stamped with that day's date and your office name. (Some offices even include the time of day on the stamp.) The reason is obvious, especially if you're concerned about people saying dishonest things about your ability to meet deadlines.

I also insist that all envelopes be saved and attached to correspondence. Looking at the postmark gives me an immediate way to check the date something was mailed. More than once this has saved me from an embarrassing situation. I have seen discrepancies of as long as two weeks between the date on a letter and the postmark. I never hesitate to point out these discrepancies whenever anyone complains about my lack of a quick response to their requests.

Run a numbers game

Another way to become more effective is to make sure you know how to reach people quickly. My favorite technique is to find a reason to use someone else's telephone when I am visiting his or her office. Most people are not secretive enough to remove their telephone numbers — especially those of their private lines — from their office phones. I memorize these numbers and keep them at my fingertips. Obviously, you don't want to call the president or the vice presidents on their private lines frequently. However, these numbers have come in handy during crises or when other administrators are working after hours and don't answer the regular office telephone.

Set deadlines

Never allow anyone to leave your office without setting dates or deadlines for future steps in a given project, especially when timely delivery is of utmost importance. One of our freelance suppliers often failed to meet stated deadlines. I never allow such a person to leave without setting up a meeting *exactly* on the time and date of the predetermined deadline. Al-

though these "meetings" may not last longer than a few minutes, they are intimidating to people who do not normally meet deadlines. I make it clear that everything must be ready at that time, since there will be several people present to review it. The appointment is signed, sealed, and delivered before the current meeting breaks up. Furthermore, my secretary does not encourage postponements of such meetings. In fact, she calls to confirm that the person will be there at the prearranged time.

Program interruptions

One problem is a telephone call that becomes too long or an office visit that gets out of hand. Many secretaries are trained to interrupt certain telephone calls by buzzing the boss and saying that an urgent long-distance call is on the other line. This gives the boss an excellent opportunity to break off a chatty conversation without hurting feelings. Another way to break off lengthy discussions in the office is to have the secretary come in and say a long-distance confidential phone call is coming or that "Your next appointment is coming soon and you must get ready for it."

Consider appearances

Equally important, a public relations director's office should appear to be highly organized and efficient. Consider arranging your desk so that you will be facing the door. Arrange materials on your walls to look both attractive and organized. Choose colors, such as golds, browns, and subtle reds, that reflect warmth.

Control the world around you

To make sure others see you as organized and effective, give them lots of signals to that effect — beyond conversation and actions. For example, plan your office so visitors immediately get a positive feeling. Carefully arrange the placement of desks and furniture as well as the artwork and awards hung on the walls. Your secretary should always face the door so that visitors immediately see a smiling face.

Remove barriers

When a person comes to your office to discuss a project, you foster one-to-one communication when you get out from behind your desk, walk to greet your visitor, and sit down close to him or her for a face-to-face discussion. This both increases the chances that you two will have a productive discussion and conveys the impression that you believe in openness and trust. Desks can serve as subliminal barriers that intimidate others, when that is not your intention.

Organize your work area

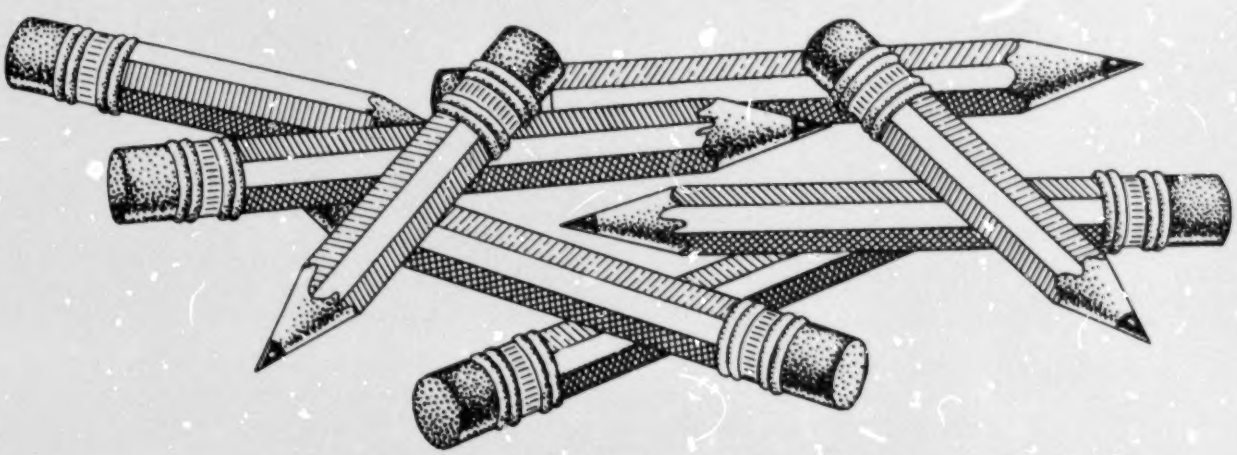
Here are some suggestions for making your work area more attractive and efficient. Put your telephone on a bookcase or credenza behind your desk, not on it. This way, cords do not get in the way and you minimize the amount of clutter on the desk itself. Use this same bookcase or credenza for instantly available vertical files — the files you need so often that you don't want to keep them in a drawer.

Look busy, busy, busy

Project to others the appearance of being as efficient and busy as you really are. For example, try carrying a briefcase and dictating equipment with you so that you can fill minutes waiting for meetings or waiting for appointments with productive work. This both lets you accomplish extra work and conveys to others the image you want — of the efficient executive who doesn't waste time.

Another technique is to sit at meetings in an unobtrusive place, preferably by the door. This enables you to leave if a meeting runs too long or, if your full attention isn't required by the discussion, to handle routine paperwork.

Plan everything that you do, set objectives, and then get your boss to approve. If you do those things and if you manage your time effectively, you will be known as a highly organized and efficient manager who is decisive and always beats deadlines. And you'll never have to fall back on Boren's Laws: "When in charge, ponder. When in trouble, delegate. When in doubt, mumble." CASE



NOW IS THE TIME

Stop procrastinating and start getting ahead

BY JOHN W. LEE

In my seminars, I always ask the participants if they know of any individuals who should be members of Gamblers Anonymous or Alcoholics Anonymous. Many raise their hands to signify yes. Then I ask them if they know any individuals who would benefit from joining my newest organization — Procrastinators Anonymous.

I get a lot more hands and a lot of laughter, for there are more procrastinators than gamblers and alcoholics combined. In fact, the damage done annually to personal and professional lives by procrastination far exceeds the damage done by gambling and drinking.

Procrastination is more than just a thief of time. It steals our self-respect. It robs us of happiness and dreams and lessens our capabilities.

You can conquer procrastination. The first step is to identify the cause. Procrastination is negative delay, but not all delays are procrastination. Delays can be beneficial if there is a high level of uncertainty or a lack of knowledge about what you have to do. The important thing here is to do something to clarify the uncertainty or to reduce the lack of knowledge.

Don't fool yourself into believing that it's possible to justify all delays. That attitude leads to disappointment and disillusion. Former President Woodrow Wilson recognized that danger with a variation of an old quote: "All things come to him who waits — provided he knows what he's waiting for." The Chinese have a proverb: "Man who waits for roast duck to fly in mouth must wait very, very long time." Waiting isn't associated with winning very often, and neither is procrastination.

Why procrastinate?

We can think of dozens of reasons to deny the initial effort it takes to get started, but generally those dozens can be placed in seven categories. We don't do the things we should *when we should* because:

1. They seem too time-consuming.
2. They seem too long-range for us to worry about.
3. They seem unimportant now (although we know that they will be important later).
4. We are not committed to them.
5. We are not pressed for completion.
6. We don't like to do them because they are distasteful, unpleasant, or difficult — or all three.
7. We see no benefits in doing them.

Ironically, dreading and postponing a task may be more tiring than doing it. Apprehension over delayed unpleasantness may so preoccupy you that you can't do the things you want effectively.

How to break the pattern

Keeping a procrastination list or file is a positive step toward reversing the trend. If you are a serious procrastinator, you might even want to keep a procrastination drawer. But if your desk is slanting to the procrastination drawer side, you have a problem.

Now that you know why you procrastinate, and how, you're on your way to changing — *if* you make the positive commitment to make things happen.

Start your days intelligently. Make it a habit to do the hard things first, and then you'll undoubtedly feel better about the rest of the day.

Difficult tasks naturally require more effort. Start by doing bits and pieces. Remember the motto of Robert Schuller, pastor of the Garden Grove Community Church in California: "Inch by inch everything is a cinch." Make yourself work on a tough assignment for five minutes the first time, then add a little time as you do it again and again. Soon you'll have the job done. The important thing is to begin.

As you progress, start setting deadlines for yourself, and reward yourself when you meet a deadline.

The next time you laugh at procrastination it should be because you have conquered it. Living positively and beating procrastination by positive action will add to both your productivity and your enjoyment of life.

The early bird gets the breaks

Now that you've conquered procrastination, take the next logical step: Become an early starter. When you start late, everything tends to work against you. Meetings begin without you, planes leave on schedule, traffic lines get longer, parking spots disappear, and the thousand-and-one things that normally go right, go wrong. Murphy's Law is most applicable to late starters. In life the only luck you deserve is the luck you earn — and starting late earns *none!*

When you start early, things may still go against you, but you have time to make changes as circumstances dictate. You find yourself with a psychological edge. You know you have the time to handle the problems you're facing.

When you run late, on the other hand, you tend to compound your problems with additional mistakes that result from lack of time to think.

Starting early is one of the most important lessons anyone can learn in life. It can add years to your lifespan and lead to innumerable successes. Starting early is synonymous with success, whereas starting late leads to the "muddle through" approach to managing time and life. Muddlers are always behind and upset at the way "things" conspire to work against them. Yet their real enemy is themselves. They continue to muddle until one day they realize they have muddled away their lives.

Individuals who habitually start early make things happen and tend to be in the right places at the right times. When you start early, you are "lucky" enough to avoid traffic and get the right parking spot. You're "lucky" enough to be able to choose a good seat on the plane or at the show. You're also "lucky" enough to know the satisfaction that comes from having completed what someone else is just about to begin. If you doubt this, watch the subtle smiles on the faces of those who complete their work early and exit while others toil.

John W. Lee is president of John Lee Companies of Crawfordsville, Florida. The firm provides hour-power speeches, seminars, and scheduling systems services.

Setting a plan of action

One of the best ways to start your day early is to get prepared for whatever you must do the night before. If you establish your plan and get organized the night before, you can start doing things when you come in rather than just thinking about what you must do. Planning the night before is essential if you are to use your morning hours productively. You'll find yourself getting more done each day when you start early, and the rest of the day will, more often than not, go well.

All too often a poor start throws off the entire day. You generally end up further and further behind and eventually lose the enjoyment of the moment and of the activity in which you are engaging. It's no fun being late in a society that values promptness and performance. It's also not in the best interest of those who work with you (or whom you work for!) because your lateness puts them behind as well.

Starting early should be a goal for everyone. The benefits are substantial and the effort required is minimal. The psychological edge you get, combined with the benefits you receive, will help make starting early a habit. The early bird gets the worm, and the early person often gets the successes in life. **CASE**

TIME TRAVELERS

How PR practitioners steer the time machine

BY M. FREDRIC VOLKMANN

As PR professionals, we often speed through time. We make quick stops for tasks requiring immediate action, but we must maintain good mileage with our long-term projects. How do we steer the course of our days? What advice do we offer fellow travelers through time?

To find out, I recently conducted a nationwide survey of 200 randomly selected PR managers. Exactly 50 percent responded in less than two weeks to my 20-question survey on time management and planning. Here's a summary of my findings:

Organization. Of the respondents, only 35 percent said they think of themselves as "highly organized"; 53 percent said they are "organized." Even worse, 12 percent think of themselves as either "somewhat organized" or "not organized."

Efficiency. Fourteen percent said they view themselves as "highly efficient," while 72 percent said they were just "efficient."

Management skills. Only 14 percent think of themselves as "excellent managers," with 72 percent saying they are "good managers." One-fourth said they "like doing many things at once"; 19 percent said they are happiest doing only "one or two things at a time."

Clean or cluttered desks. My survey also asked managers whether they work best from a clean desk or a cluttered one. Some said, "I need materials close at hand," "I work on more than one thing at a time," or "My clutter is organized." As a person who vacillates between a cluttered desk and an organized one, I can tell you I get more results from appearing to be organized than from running what looks like a scrap paper drive.

Decisiveness. Seventeen percent think of themselves as "very decisive," while 75 percent said they are simply "decisive." Eight percent think of themselves as either "somewhat decisive" or "indecisive."

Obviously, not many of us see ourselves as top-notch, effective leaders/managers. This is especially interesting when you consider the nature of our work — the punishing deadlines and quick responses demanded of us daily. But if our self-perceptions seem to lack confidence, our work habits may be of even greater concern.

Time at work. About 20 percent of those responding to the survey said they are "one to two hours early for work," while 46 percent are either "on time" or "late to work." The balance said they always arrive "a few minutes early." On the other hand, 55 percent "stay late at work about one to two hours," and 31 percent "stay late for a few minutes."

Delegation. Twenty-three percent said they "always delegate work to others," while 73 percent said they "sometimes" do so.

Deadlines. Only 8 percent of our peers say they "beat deadlines," while 59 percent simply "meet" them. The rest — 33 percent — admit they "do not regularly meet deadlines."

Interruptions and workload. Eighty-five percent said they "often seem to be interrupted," while 6 percent said they are "rarely interrupted." Eight percent said they are "very frustrated" with office workloads; 18 percent said "often frustrated"; and 50 percent said "occasionally frustrated." Only 15 percent said they are "never frustrated" with their office workloads.

According to the survey, there are ways to concentrate and to avoid interruptions. Here are the 10 most frequent answers in rank order:

1. Close the door.
2. Hold all calls and have someone take messages for later callbacks.
3. Work before or after regular hours, on weekends, during lunches.
4. Screen all telephone calls and let through only those that require your immediate attention.
5. Escape from your office to your home, library, car, and so on.
6. Block time (i.e., reserve it for specific tasks before you start your day).
7. Prioritize meetings and assignments; do only the ones that are most important.
8. Use simple methods of concentration to blot out background noise or disruptions.
9. Work fast.
10. Do hardest tasks first.

Time wasters

Respondents also listed ways that people waste time, such as:

1. Telephone calls that are either unmanaged or too long.

2. People who drop in without appointments.
3. Conversations among staff and student interns.
4. Procrastination.
5. Meetings that have no agenda or time limit.
6. Lost or misplaced items.
7. Idle or underutilized staff.
8. Questionable paperwork.
9. Poorly sorted mail.
10. Duplication of work.

Time savers

Another question in the survey asked respondents to report their favorite time savers. Here they are (listed in the order of highest frequency):

1. Delegate.
2. Prepare "to do" lists daily.
3. Hire and keep only good staff.
4. Efficiently schedule time for projects and for meetings.
5. Return all calls at prearranged times, not as they come in.
6. Screen all calls and have the secretary delegate as many as possible to others on the staff or to other appropriate offices.
7. Use dictation equipment and word processors.
8. Insist on having well-run meetings; be sure to use staff meetings as times to delegate work.
9. Always answer mail as you read it; don't let it stack up.
10. Eat lunch at your desk. CASE

SOUNDS OF SILENCE

An experiment in leaving noise and confusion behind

BY RICHARD E. MATHENY

The weekly development department staff meeting was concluding with a report by the director of public relations. She made several suggestions to improve internal communications.

"Great ideas!" I responded. "Take some time to think through how we might implement them."

"Think? What's that?" the public relations director snapped. "If I took time to think, the production schedule would fall apart."

Amid much laughter, the staff meeting ended. But that remark kept running through my mind. Several visits to the public relations office underscored the validity of the comment. Ringing phones, constant interruptions, meetings, and deadlines were the normal order of the day.

The public relations director is right, I thought. There is no time to think. When I investigated other areas of the development department, I reached the same conclusion. We had become the college fire department. Putting out brush fires created by the sparks of inadequate planning consumed our workday. It was time for a change.

For several years, I had served as a consultant to corporations and governmental agencies throughout the United States and Canada in the area of management and organization. I had exhorted executives to turn their backs on the incoming mail basket, put their feet on the desk, gaze out the window, and think about ways to make themselves more productive. Experts in time management have focused on "to do" lists and neglected "to think about" lists. It was time to apply my own medicine to an obviously ill patient.

Several staff members offered solutions. We combined these ideas into a departmental pact to create a period of quiet time from 8 to 10 a.m. each day for the next six months. Under the pact:

- phone calls would be automatically forwarded to the receptionist;
- we would prohibit visits from one office to another;
- clerical staff would not be given additional workload;
- we would discuss any violations due to special circumstances at a weekly review meeting.

We shared the experiment with other offices of the college. We wrote a carefully worded memo outlining the agreement with a plea for cooperation. Reaction was swift. It ranged from "innovative and insightful" and "I'll try it" to charges of elitism and demands for review by the entire president's cabinet. Nonetheless, the experiment in quietness was underway.

Day one started with an embarrassing incident. An adjoining office began its day with the normal coffee-time chatter and review of the last evening's

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events. Suddenly the people involved realized that their conversation was permeating a sea of calm and quietness. We instantly felt unspoken hostility.

As weeks passed, we felt less that the quiet time forced us to be rigid and more that it enabled us to be creative.

We found that we could accomplish projects much faster and more effectively when we could concentrate on them without interruption. The need to violate the pact diminished after each progress review. The experiment was providing unquestionable benefits.

After six months, a thorough review of the experiment in quietness yielded these conclusions.

Benefits

On the plus side, the quiet time:

- increases productivity, especially for complex projects requiring large blocks of time;
- reduces mistakes caused by faulty planning;
- permits better organization of the balance of the day;
- allows us to give more and faster attention to priority work assignments;
- increases our focus on and commitment to common goals; and
- makes overall management of work time more efficient.

Drawbacks

On the minus side, the experiment:

- requires time for evaluation;
- is more difficult to implement in just one segment of a college;
- can create suspicion and distrust from people outside the organization;
- can be a problem for employees whose creativity is not at its peak in the morning; and
- can cause internal disharmony if some employees are over-zealous.

The entire staff agreed to wait six months before deciding to renew our quiet-time agreement permanently.

Regardless of the decision, the long-range implications are definitely positive. We've established new work patterns for many employees, who now start their day with creative reflection on the priorities that should command their attention in the hours ahead.

When you stop to think about it, it's a great way to start the day. CASE

THE WRITE TIME

Making room for creativity in a crowded agenda

BY PAT ROESSLE MATERKA

Time management is especially important for writers. As a writer, you can never be certain how long an assignment will take. On some days volumes of snappy prose will leap from your typewriter. On others, you may be stuck for an hour on the lead sentence. Rambling meetings, phone calls, and other interruptions further throw off the agenda. Nevertheless, there are ways to keep your efforts on target.

1. *Take inventory.* Assess the tasks before you. Decide which ones represent (a) high, (b) medium, and (c) low payoff. You may also have a category (d), no payoff (or busy-work). Plan your day so that you can allot maximum time to high payoff activities that reflect credit on you and your institution. Then get the low-ranking chores out of the way.

If you get a phone call, cue the caller to come to the point by asking: "What can I do for you?" (If you ask, "How's everything?" he or she might tell you!) If your time is limited, say, "I have an appointment in five minutes" or "I'm expecting another call." Ask if you can call back at a mutually convenient time.

You can discourage people who drop by to socialize by using body language. Lean forward, not back, in your chair. Keep pencil in hand. Or stand up when the visitor enters. Don't suggest that he or she be seated. Think of something you need near the visitor's office and walk him or her back. Then you can control the exit.

2. *Use prime time.* Productivity depends not only on what you do but when you do it. Tackle your top-priority writing assignments during your prime time of day — the hours when you feel most ambitious and creative. Try to block off at least 90 minutes at a time when you can write uninterrupted.

3. *Don't reinvent the wheel.* Keep copies of routine news releases on subjects such as faculty promotions and annual conferences so that you don't have to recreate them each time.

4. *Resist being a perfectionist.* The four-color student recruitment brochure deserves your best effort. The staff memo on new parking regulations does not. Don't waste time polishing a routine letter or news item; just convey the message and get on to bigger things.

5. *Protect your creative turf.* In a public relations job, interruptions go with the territory. You can't avoid them, but you can minimize them.

One college magazine editor averts drop-ins by removing extra chairs from her office. Another makes it known that when his door is closed, he doesn't want to be disturbed. Be direct. Tell your coworkers, "I'd like to talk, but I must finish this work first."

6. *Get it on paper.* If you're temporarily suffering from writer's block, get *something* down on paper, even if you don't like the way it sounds. It's easier to improve a first draft than to face a totally blank sheet of paper.

7. *Make a commitment to someone.* By telling your boss you'll have the project done by a certain date, you'll put more pressure on yourself and have an added incentive for meeting your goal.

8. *Promise yourself a reward.* Ralph Waldo Emerson said, "The reward of a thing well done is to have done it." But there's nothing wrong with treating yourself to a good novel, a dinner out, or a three-day weekend. Celebrate your accomplishments. CASE

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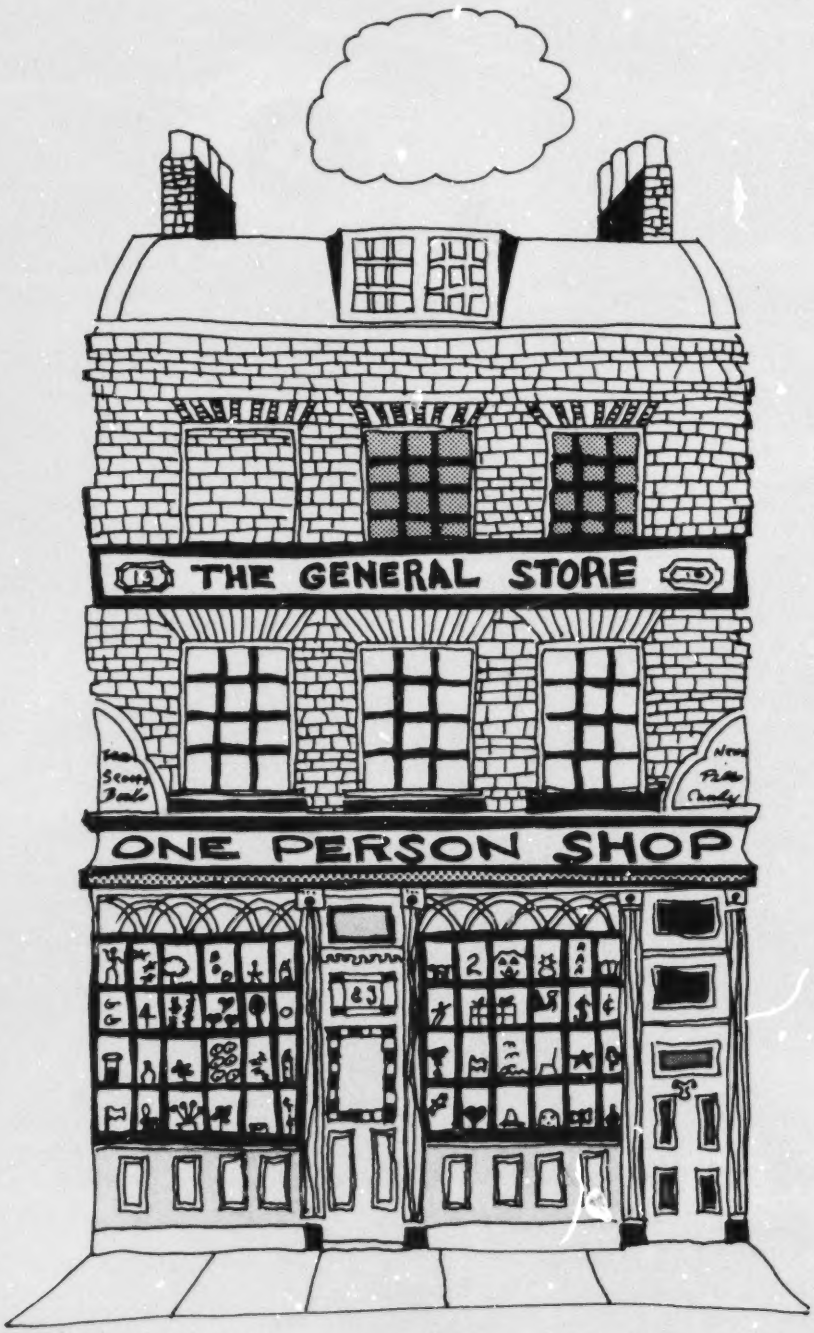
2

productivity

getting ahead in the small shop

SMALL SHOP SURVIVAL MANUAL

BY NANCY HARPER



Illustrations by Cathy Gordon

We, the willing
led by the unknowing
are doing the impossible
for the ungrateful.

We have done so much
with so little
for so long,
We are now qualified
to do anything
with nothing.

If you are sitting at your work-laden desk thinking that someone wrote a poem just about you, don't worry. A lot of others are thinking the same thing.

The words could apply to almost any worker these days. But they have special meaning for managers of one- or two-person information offices. With small budgets and no staffs, some of you hold titles that read like a one-man band sounds.

While we cannot put dollars into your printing fund or send you Pulitzer Prize-winning writers to help, we can offer some suggestions that might make your work easier and help you survive.

Most of the suggestions are your own. Some came from your responses to a survey conducted by Penn State's Art Ciervo, director of public information and relations. Ciervo surveyed news bureau managers at 60 small colleges around the country. Jayne Zenaty, formerly acting director of public relations at Clarke College, drew together ideas from 20 small bureau managers.

The first nine ideas came from Philip Lesly, head of The Philip Lesly Company, a public relations firm in Chicago. He suggests that you first recognize that, with all its problems, the one- or two-person department affords you an exceptional opportunity to become a generalist when almost all forces in our field are shaping specialists. The person who cannot call on others to perform specialized tasks learns to do everything. In the process, that person stretches his or her mind.

LESLY'S LAWS

1. Educate your administrators on the comparative value of the different jobs under your responsibility. Since you can't do everything, they should realize that it is good judgment and good management to neglect lesser matters in order to complete important projects.

2. Keep a log of your activities, and note for whom each is performed. This will help you prove what you've done, and how much time you've spent on it. In addition, you will also be able to tell the percentage of your total work devoted to each department or project.

3. "Charge" time to each area. Operate as if you were an agency charging each unit on the basis of time spent and the share of the budget needed to get the work done. The list can help you resist unwarranted demands on your time and budget and might help you get added staff for special projects.

4. Analyze the abilities of your secretary, if you have one. Can that person write, handle media inquiries, set up events, and work with printers? Delegate as much of the work as possible.

5. Organize your time so that planning and creativity are not lost in the scramble of everyday work.

6. Try to mechanize routine jobs and inquiries as much as possible. Prepare and keep up-to-date files of canned materials that can be used to meet a large number of the inquiries.

7. Recruit volunteers, probably students, to do legwork and research. Get young people who want to gain experience and build up references. And, when they demonstrate the skills they've acquired, give them recognition —a letter of recommendation or a thank-you in your literature.

8. Don't have a luncheon meeting for something that can be done in eight minutes on the phone. Use your lunch hour for important meetings and for planning.

9. Don't sacrifice reading. You need to keep current and expand your horizons.

ZENATY'S ZINGERS

1. Each week, outline the events you must publicize. Identify the media to be contacted, the dates you would like the stories to run, and the deadlines you must meet. Update the outline weekly and try to stay two weeks ahead.

2. Write in one day all the routine news releases for upcoming events. This often allows you to put more than one release in each envelope and saves time and postage.

Mechanize routine jobs.

3. Investigate piggyback coverage with other colleges. If you spot a trend, for example, contact the news services at other local colleges and combine the information in a feature.

4. Don't downgrade the importance of hometown releases, but don't spend all your time on them either. Send a copy of the release to the student's parents, with a letter requesting a clipping from the hometown paper. Often, the parent will call the editor of the paper if the story does not appear.

5. Get help from students by using the old Tom Sawyer trick: Make the work a status symbol. With student photographers, for example, pay them as well as you're able to, and fire those who don't measure up to high standards. Look into having some students earn academic credit for working in your office.

6. Plan ahead. Use slack times, if there are any, to write skeleton releases for annual events such as graduation, orientation, and homecoming.

7. Deal with problems immediately. Today's 10-minute phone call to an unhappy faculty member could save you from a bothersome hour-long meeting next week.

8. Know your resources. Ask a research librarian to select bibliographies that might help you revise your mailing list. From the alumni association, get names of alumni who could help place your news stories in their local papers or on TV or radio.

9. Put a flower on your desk. Once a day, look at it and consider the benefits you derive from being your own boss.

CIERVO'S SUGGESTIONS

1. Set priorities. Many small-staff news directors follow these priorities: (a) deadlines, (b) demands of the administration, and (c) media requests. Don't, however, spend too much time meeting the demands of the most vocal or most persistent requests. Put another way, resist the attitude that "the squeaking wheel gets the grease."

2. Get other administrators to handle content for the general catalog. Do only the production end of it yourself.

3. Use the telephone instead of spending that time running all over the campus.

4. Encourage reporters to write their own stories about your institution. This will save you time and increase your chances of having the story appear.

5. Work closely with printers to discover shortcuts, to avoid mistakes, and to save time and money.

6. Try, when possible, to get other employees of your college involved in public relations. The president, for example, might like to write his or her own speeches, or the registrar might agree to proofread catalog copy.

7. Use secretarial staff or students to do hometown releases using a sample release for guidance. Clip stories from the student newspaper and alumni magazine, and mail the clippings to hometown editors for use in their newspapers.

8. Consider using Gestefax to reduce stencil-production time for in-house publications and news releases. Instead of typing a stencil, you type the information on a sheet of paper that's fed into the machine. It then makes a plastic stencil to be used for copies. The benefits of Gestefax are ease in correcting copy, elimination of retyping corrected copy onto stencils, reasonable

cost, and good quality. The machine sells for about $1,600.

9. Ask departments to prepare copy as completely as possible and to do as much background research as they can, thereby reducing the amount of research your office needs to do.

10. Use the services of artists who work on a "moonlighting" basis. One news director found that this saved the school two-thirds the cost of sending art to a studio.

11. Eliminate sending news releases to other colleges and universities.

12. Look for ways to do jobs in-house, but keep in mind that there are times when professional help can save you money. Ask your friends in the art and journalism departments for guidance.

13. Save money (as much as 50 percent of publication costs) by putting your publications out for bidding.

14. Type your own copy for publications, cutting out typesetting costs. Have a student volunteer type alumni notes to produce camera-ready copy for the printer. This saves not only typesetting costs, but also time spent proofreading the typeset notes.

15. Select and target your releases.

16. Periodically review mailing lists and eliminate people who aren't using your material or who don't want it. Completely review and revise your mailing lists at least once a year.

17. Recycle your own paper. Reuse envelopes for campus mail and reuse old releases (yours and those that come in) for scratch paper and for writing drafts of releases, letters, or memos.

18. When possible, mail two or three releases in the same envelope.

19. Consider using last year's catalog cover on the front of this year's college folder. You often save money by using the same color separations and negatives.

20. Have your printer save for you usable scraps of paper for note pads.

21. Design a publication to be used more than one time.

22. When possible, use AP or UPI to disseminate your story. This eliminates mailing to many outlets.

23. To save some time and effort in correspondence, answer some letters with notes on the bottoms of the original letters. You can make a Xerox for your file.

24. Pick up your pictures after they've run in the local papers and use them again. Also, get pictures from other offices on campus to help build your photo file.

25. Consider reducing white space and thereby cutting the number of pages in your publication. To save space, you could increase the line width. By running 30 picas across the page instead of 24, for example, you can get 25 percent more copy on a page and reduce the number of pages by 25 percent.

26. Underwrite some of your publication costs through advertisements. You can't do this with every project or offer your space to every advertiser. But, for example, consider asking restaurants, hotels, the alumni association, or the campus bookstore to advertise on a campus map to help offset its cost. CASE

THE SMALL-SHOP STRETCH

Hour- and dollar-stretching ideas from 15 institutions

BY BARBARA MCKENNA

If you are performing out of a small shop but are expected to produce big results, prepare yourself to do the small-shop stretch in a pin-striped sweatsuit.

The people who have told CASE CURRENTS how they manage their small shops all stretch to the same beat. They start off with a long-range plan. They trim off projects with the least return. They create systems to deal with daily chores. They define carefully their staff's regimen. They look for outside help. They depend on reinforcement through feedback and freely offered ideas. And they run the extra mile.

What follows are ideas that work for 15 institutions. Many are winners from the CASE 1980 Recognition Program. Other ideas are from small shops that compensate for limited staff and resources in ingenious ways.

Looking ahead

Small-shop directors are unanimous on one point: Long-range planning is the key to success. Despite the pressure of immediate deadlines, these managers somehow find time to work on projects that won't show results until next year. Their primary tool is, of course, the calendar.

Jane Thorpe, director of alumnae relations at Westhampton College, creates a master calendar every year. "When you have a diversity of programs and activities, it is easy to let something slip through a crack," she says. On her calendar she marks when to start thinking about a project and then each step of the process.

High Point College's Director of Information Services Pete Petrea avoids the "deadline syndrome" by using his calendar in two ways. In addition to focusing on the project starting dates instead of the due dates, he also has a "tickler" calendar. He explains: "If Student Personnel brought me a schedule of orientation in August and I needed it in July for news, printing, or publications, I put a note on the calendar of next May to tell them I need it earlier than last year. Put the burden for meeting deadlines on other people, not yourself."

The most important project in the Office of Development at Bryant College is the annual fund campaign. Therefore, its schedule is the least flexible and the first one inked onto the calendar. Development Director Karen Beaton-Simmons bases her planning for the annual phonathon and direct mail campaign on a five-year analysis of giv-

ing trends. These patterns determine the dates for those activities. Beaton-Simmons then fits her other activities around these "must" dates and re-evaluates her schedule every two years.

Art Ellis, director of public relations and marketing at the Philadelphia College of Textiles and Science, has an 18-month publications calendar. If he sees he has a big project coming up in June—for example, the catalog—he'll start stockpiling manuscripts for the June issue of the alumni magazine in January. Then he doesn't end up doing two different publications at the same time.

Setting priorities

Every small shop person must be a cost-benefit analyst. In addition to weeding out poor performers, effective small-shop managers ask crucial questions before starting a program.

In deciding which special events to develop, Cabrini College's Vice President for Development John Heiberger asks these questions:

- Can we staff the event?
- Will the event really produce results or are we using the excuse, "It's good PR"?

Everything Linda Crossley did while director of information services at Olivet College had to lead to one of three results:

1. raise money for the institution;
2. recruit students; or
3. foster an environment in which (1) or (2) can occur.

One of the ways Westhampton's alumnae association increases participation is to eliminate unnecessary though traditional tasks and to take innovative shortcuts.

Jane Thorpe finds that the vast majority of Westhampton alumnae send their gifts in the spring. "It doesn't make any difference what we do," she says. "The gift will come in the spring. Therefore, I eliminated a costly fall mass mailing. Instead, I direct my autumn efforts toward our larger givers, who, for tax purposes, are interested in sending their gift before January 1. We plan phonathons for February and March."

Thorpe also eliminated one of two yearly reunion announcement mailings and mails postcards bulk-rate in lieu of letters. The size of the reunion turnout is as big as ever.

The Carleton College news service streamlines its efforts by giving priority to story ideas that can be used in more than one medium. For example, former News Bureau Director Deborah Blakeley says: "There must be the possibility of a television interview, a radio feed, publication in an alumni outlet, or potential for magazine coverage as well as a shot at the press before we will spend time on one story."

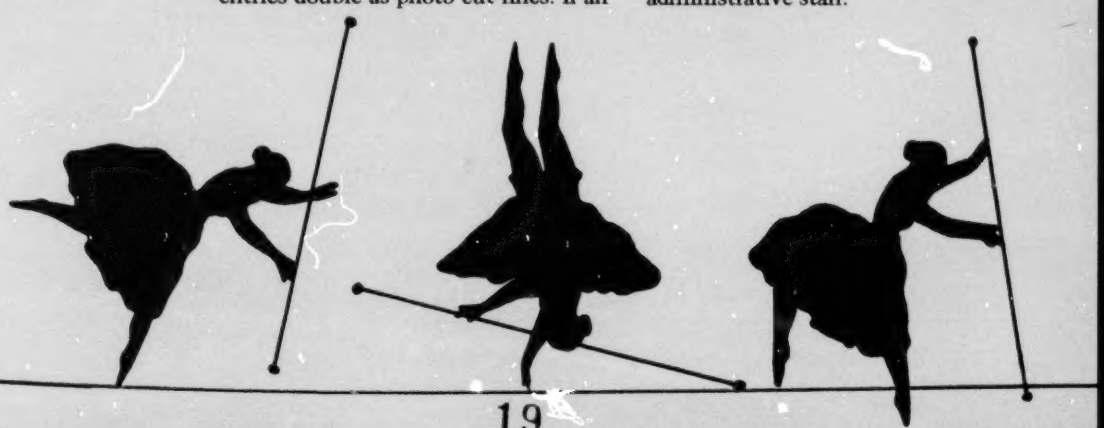
Carleton's weekly and long-range calendars also function as tip sheets and press releases. A paragraph describes each entry on the schedule. Some of the entries double as photo cut-lines. If an upcoming speech stands a chance of running in a specialized publication, someone in the office simply circles the item and sends the calendar to the appropriate editor. The technique has increased the amount of exposure Carleton receives in the press, even though the staff size remains unchanged.

Art Ellis gives priority to PCTS story ideas that can be used in more than one way: "Information gathered for a recent theme issue of our alumni magazine was also digested into feature articles for the media," he says. "Later, these appeared in a fund-raising mailer and will surely turn up in recruiting publications and advertising copy."

Sometimes when your office is small but your responsibility is mighty, the only way to realize your priorities is to aim for the whole flock when throwing your stones.

For example, editors at the Phillips Academy and the Allendale Columbia School, both 1980 Recognition Award winners, send their newsletters to reach more than one constituency.

The Phillips Andover *Parents Newsletter* provides up-to-the minute, informal, direct communication to parents from the school. While there are no pictures and no frills in the newsletter, it is packed with timely information. Editor Helen Eccles gets a second life from her newsletter by sending it to trustees, alumni, class agents, alumni admissions representatives, faculty, and administrative staff.



Allendale Columbia School's newsletter is multi-purpose, too. Until eight years ago, Allendale and Columbia were separate schools. Newsletter Editor and Director of Development Ann de Laval Schaefer finds that the newsletter unifies the two school's alumni, faculty, and staff. It also presents the school's new image.

Gallaudet College beefed up its weekly newsletter and found rewards and savings in an improved internal communications system. Editor Vickie Walter reports: "We eliminated paperwork by including items of campus-wide interest in the newspaper instead of sending out memorandums." She said that her new format includes announcements of program changes and the latest policy developments that affect employees. Other columns that appear regularly include personnel policies and benefits, business and financial information, and more in-depth news and feature stories.

To organize, systematize

From filing the smallest bit of paper to mounting a campaign for 10 million dollars, every office must have a system for dealing with routine tasks, major and minor. Offices vary in their degrees of sophistication.

The Carleton News Bureau has reduced the production of hometown releases to a science—computer science, that is. Director Ruth Stevens says her office began by writing a computer program with the people in the Data Processing Office. The computer can pull individual information on each student from its bank and insert it into the appropriate blanks in certain news items. The news staff prints stories on students entering as freshmen or graduating with honors without even touching the keys of a typewriter.

Bryant College installed a word-processing system in its Development Office last year. Karen Beaton-Simmons carefully devised a format of financial record-keeping that can quickly generate monthly and yearly reports based on daily input.

Pete Petrea uses a stylebook for as many stories as possible. He advises writing up a standard form for each kind of story coming out of your office; you then leave appropriate blanks for vital information. He uses High Point students to do the stylebook stories. He counsels, "Do not let anyone dawdle at the typewriter thinking of ways to get ordinary things written. Compose an interesting, workable, easily followed style sheet and see that it is used."

Direct mail is an effective, low-cost system for reaching a large audience. Sara Fountain, director of public relations at Agnes Scott College, traces the success of her yearly student-recruitment and cultural events to her mailings. At an average per unit cost of 13 cents, Fountain uses direct mail to invite high school students to campus for Agnes Scott's "OktoberQuest" night and "Kaleidoscope" weekend. Fall/Winter and Winter/Spring calendars mailed at an average cost of 14 cents help swell attendance at the college's regular cultural events.

Whip your staff into shape

Support staff members are clearly essential to your small shop team. Some officers find that a tightly structured environment produces the best staff performance. Other officers want a flexible team that can adapt to changing work flows.

Karen Beaton-Simmons accomplishes a great deal of work at Bryant by attending to her support staff. She carefully defines the duties of her two secretaries. One secretary handles all correspondence, appointments, and daily activities. This person also acts as production assistant for phonathons and mailings. The other secretary keeps all corporate and alumni financial records.

Jane Thorpe has two part-time workers and tries to ensure that they do the work for which they are best suited. Recently she noticed a problem with the arrangement. One person who had been in the office for quite a long time was not adapting to changing demands. So Thorpe switched responsibilities around and has a happier staff and a more even work flow.

Pete Petrea advises making a definite division of work between yourself and your secretary or general assistant. Clear understandings should prevail about who does what so that the right person handles projects from the start.

Use outside help

Lisa Sheble, director of publications at the Spence School, has an editorial board consisting of a member of the Parents' Association, a member of the Alumnae Board, the director of development, and the academic dean. The board gives Sheble ideas, and its members write for the Spence School *Bulletin, Newsletter,* and *Annual Report.* This leaves Sheble free to design, photograph and paste-up Spence's Recognition-Award-winning publications.

Centre College of Kentucky won a 1980 Exceptional Recognition Award for Improvement in Financial Support. The development staff has boosted the annual fund total by 50 percent since 1976. How have they done it?

The staff size is unchanged from 1976. One person spends half his time working on development projects, and has a clerk helping one-fourth time. The budget has only increased from $12,000 to $15,000 in three years. But volunteer participation more than tripled, from 125 to 400.

In his report General Secretary Rick Nahm explains that he screens prospective volunteers as carefully as he does major gift prospects. "Each volunteer is selected on the basis of the following qualities: demonstrated loyalty to Centre; influence and respect in the community; good record of financial support to Centre; knowledge about Centre; persistence and enthusiasm; commitment of time; and ability to communicate." Volunteer help was the most important factor in Centre's winning campaign.

Antonia Thomas, director of public information at Allegheny College, feels students are her greatest resource. She uses student photographers on an "as needed" basis for help with news service and public relations functions, and student recruitment publications. Once per term she advertises for photos in the student newspaper. She picks the students who submit the best work to be her "photographers." Usually, she has two or three who stop by the office twice a week to take their pick of assignments off the bulletin board. In exchange they get free use of the darkroom and supplies.

Linda Crossley points out that "students will provide you with excellent services in exchange for bylines and copies of the published work for their portfolios."

Don't overlook your relationships with the people who fill your orders. It's their job to make your job easier. "I've developed an affinity for small businesses because even our small accounts are important to them," says Art Ellis.

Find nourishment from feedback

Antonia Thomas has found that faculty members are often your best, unsolicited critics.

"Circulate," Linda Crossley recommends. "The more visible you are, the more people will think of you and contact you. Visibility provides valuable feedback, sensitivity to special needs and situations, and how else are you going to find out that the champion heavyweight wrestler sings in the concert choir?"

The first time Jane Thorpe had to draft a fund-raising appeal she went to see CURRENTS Editor Virginia L. Carter, who at that time was the director of publications at the University of Richmond. Thorpe says, "She made it easy for me to continue asking for help and advice from a variety of people."

As the operator of a small shop with a plan, solid support, and plenty of outside help, reaching for excellence is just an everyday job. CASE

GUIDELINES FOR SUCCESS IN THE SMALL SHOP

BY WESLEY K. WILLMER

Limited resources are the small shop manager's Catch-22. Because of limited resources, your institution needs outside support, which is hard to win because of limited resources.

To determine both what small colleges (those with enrollments of 2,000 or fewer students) are doing and what they ought to be doing, I recently surveyed over 170 small-college institutional advancement offices throughout the country and studied the pertinent literature.

I found basic principles that can provide a framework to help your small shop achieve long-term effectiveness. Of course, not all principles will apply to all institutions, but here are some guidelines.

(You'll note that I've used the phrases "small colleges" and "small shops" interchangeably in this article. By doing this, I don't mean to imply that all small shops are at small institutions: I know better. It's just that my research dealt with the small-shop small-institution situation.)

Now to the guidelines:

• *Determine your institution's reason for being.* Your institution needs a clear, concise, and well-documented understanding of its *raison d'etre.* Unless you can explain to others the college's purpose and character, you really have nothing to advance, nothing to market.

Clarity of institutional purpose helps you identify constituents who care enough to support the institution. It also provides the basis for statements of institutional mis-

sion and for long-range plans.

To help small institutions, the Educational Testing Service, in conjunction with the Council for Advancement of Small Colleges, has developed an instrument entitled "Small College Goals Inventory." This management tool helps institutions clarify their goals. Once your institution knows where it's headed, it is more likely to recognize the need for institutional advancement activities to reach its goals. This should lead to a commitment to support your activities.

• *Develop a commitment to advancement.* An institution's advancement program requires a total commitment from the institution. This commitment takes the form of written goals, objectives, and long-range plans both for the institution and for the advancement area. These should include projected program changes and a long-range budget. With this framework, the small shop manager can proceed.

Of the 170 small colleges I surveyed, 67 percent had a long-range plan that included projected program changes and a long-range budget. Ninety-one percent indicated that their institution's objectives were in writing and clearly known. And 81 percent indicated that the advancement office had written annual goals and objectives, not just a single dollar goal.

• *Allocate an adequate budget.* One way to measure an institution's commitment to advancement is to look at the money it provides for fund raising, alumni, information, publications, and related activities. I measured the percent of educational and general (E & G) expenses allocated to advancement programs according to enrollment. The results are in Chart A. You'll see that the range was from 4.9 percent of E & G at larger institutions to 8.6 percent at the very smallest. Among the colleges that I surveyed, the mean (average) expenditure on advancement was 6.5 percent of the institution's E & G budget.

In an earlier study, John Leslie, former president of the American College Public Relations Association and currently vice president of development at the University of Houston System, analyzed spending data from 1973 to 1976. He found that private colleges were spending 4.25 percent of E & G to produce $150,000 to $1.5 million in gift income and 4.5 percent to raise gift income of $1.5 million to $5 million.

It is clear that institutions must spend money to raise money. There is a close correlation between the amount spent for institutional advancement programs and the amount of gift income. In fact, if your small shop has a budget of less than $100,000, it is probably underproductive in its efforts.

• *Monitor productivity.* How much should you expect to spend for each dollar your small shop raises? The answer is "it depends." I found the most common range to be from 25 to 40 cents per dollar, but it might be quite proper for brand new development programs to invest as many dollars in their donor acquisition efforts as they bring in. Within three years, however, you should be raising three to five times what you spend.

The range of expenditures to get a certain gift income varies widely. The amount you can expect to spend to raise "x" dollars depends on (1) the size and skills of your staff; (2) the affluence of your constituency; (3) the effectiveness of your president; (4) the clout of your board; (5) the location of your college; and (6) the age of your program and of your institution.

Among the small colleges I surveyed, the average cost per dollar raised (in operating and capital funds) was 29 cents. This ranged from an average of 31 cents for colleges with under 500 students to 26 cents for a college with 1,500 to 2,000 students.

John Leslie's Institutional Advancement Management Survey (1977) found that, for private colleges, the median cents/cost for the gift income range of $150,000 to $600,000 was 25 to 29 cents. In the $600,000 to $1.5 million gift income range the median cost was 20 to 24 cents.

These figures should be used with caution. I have seen trustees, accrediting agencies, and others latch onto dollars-spent-per-dollars-raised figures and evaluate the entire advancement process on this one statistic. This compounds your problems because most studies on which these figures have been based have included few small colleges. It's grossly unfair to apply the percentage spent on fund raising in a large university's capital campaign to a small college's new development program.

• *Provide the chief advancement officer with management authority.* The advancement manager needs to play a vital role in institutional decision making. Therefore you should report directly to the president and should have a position in his or her cabinet.

• *Centralize the organization.* Centralization fosters efficiency and cooperation, but these good results don't come automatically. You must develop and nurture them at the same time you are seeing that the advancement program is administered effectively.

Among the small shops I surveyed, 65 percent had centrally managed advancement functions coordinated by one manager. Eighty-six percent of the colleges reported that they cleared their news releases through a central office, and 69 percent had a centralized publications policy.

Forty-two percent of the small

colleges had a coordinated structure: personnel in alumni, fund raising, and public information who reported to a coordinating manager. Sixteen percent had an alumni administrator, a public relations person, and a coordinator who was also the chief fund raiser.

In the next most predominant arrangement, the president managed the advancement function. Fewer reported an arrangement whereby fund raising, public relations, and admissions reported to the advancement manager. Again, no one structure is right for all institutions, but a centralized approach tended to serve most needs.

• *Staff adequately.* You as the small shop manager must have adequate professional and clerical/secretarial support both in numbers and quality. Obviously, no set number of professional staff works for all institutions because staff size should relate to the objectives and complexity of the advancement program. Studies suggest, however, that small colleges should employ from two to five advancement professionals, with an additional two to five supporting staff.

According to my survey, the small college averages 4.7 full-time equivalent (FTE) institutional advancement professionals with the range being from .5 FTE to 14.5 FTE. The supporting staff size averages 3.7 FTE with a range from .5 to 15 full-time equivalents. Chart B shows the mean professional and clerical/secretarial staff size by enrollment.

Research suggests that four persons, perhaps three in certain cases, constitute the minimum professional staff for an effective program.

An adage says that a certain amount of money will come in regardless of an institution's fund-raising efforts. To my knowledge, there is no research to validate this idea, but available data strongly suggest it may be true. If so, the success of a one-person shop may be a myth. In fact, it may be better to have no advancement office, than to have a true one-person shop.

Chart A

Enrollment (FTE)	Percent of E&G
Up to 500	8.6%
500-750	7.1%
751-1000	7.2%
1001-1250	5.5%
1251-1500	5.8%
1501-2000	4.9%

Chart B

Enrollment	Professional Staff Mean FTE	Clerical/Secretarial Staff Mean FTE
Up to 500	3.9	3.0
500-750	4.5	3.4
751-1000	4.5	3.3
1001-1250	5.2	4.5
1251-1500	6.7	5.5
1501-2000	5.2	5.1

Quality of personnel can transcend quantity in some cases. The small shop must be willing to find, attract, train, or pay for competent advancement personnel. Without necessary quality, even a large staff can't do a competent job.

• *Provide top-notch management skill.* You won't get respect from your academic colleagues and from outside constituents based on title alone. You need to have a good education (I think an advanced degree is highly desirable), job experience, high energy, a good personality, and a thorough knowledge of the institution. Unless you're truly capable, your advancement program is probably doomed.

• *Involve your president.* Without the president's involvement, it's hard to achieve more than minimal results. The president should be an active fund raiser and promoter of the institution. He or she must be willing to spend time cultivating major prospects, making foundation and corporate calls, and recruiting top volunteers. In addition, he or she must establish and support a strong institutional advancement operation—one that has continuity, not a hit-or-miss operation.

Research shows a correlation between the number of solicitation calls made by the president and the amount of gifts received. Your president should make more than 10 percent of the calls on $100-plus donors and at least eight advancement-related calls each month.

• *Use volunteers.* Because the small shop operates with limited funds and personnel, volunteers, including trustees, are a major resource. A successful program requires dedicated volunteers doing a variety of tasks.

Almost invariably, a successful small advancement shop involves trustees personally and formally in an advancement committee. It uses

trustees to find new prospects and to provide advice on how best to approach prospects. Trustees conduct cultivation programs, solicit funds, and help "close the deal."

Volunteers' roles should vary according to institutional needs. They can coordinate events, assist with publications, serve as consultants, and make fund-raising calls. The keen small-shop manager can identify concerned individuals' strengths and focus these strengths to meet institutional needs. But if managing volunteers takes time away from your top priorities, consider not using them.

• *Maintain a comprehensive fund-raising program.* The bottom line for the small shop is how much money comes in. Most small colleges, many essentially unendowed, need to raise 10 to 40 percent of the institution's budget in unrestricted funds. Because of the pressure to raise unrestricted money, many small shops concentrate on annual giving and neglect deferred gifts, capital giving, and special gifts.

The long-term productivity of the small institutional advancement shop requires a balanced, comprehensive approach. Many small shops get so caught up in annual fund efforts that they neglect the other three areas. Don't make this mistake.

Small shop advantage

A small shop can avoid bureaucracy and remain flexible. You can use this flexibility to help your campus understand how the advancement program enhances the institution as a whole.

You must help others understand that institutional advancement means more than raising money. Stress that you're advancing the college when you help avert a lawsuit over campus expansion, when you work in government relations to increase student aid, when you improve student retention through better on-campus communication, and when you reduce waste through better management.

For me—and I hope for you—working in a small shop is very satisfying. The work that we do has a great impact on our institutions. No wonder, then, that we feel good when our jobs are well done. CASE

This article is based on a longer thesis by Dr. Willmer, who was formerly director of college relations at Roberts Wesleyan College. CASE has published a shortened version of his thesis in a monograph, The Small College Advancement Program: Managing for Results.

Rx FOR THE SMALL ALUMNI OFFICE

Try a dose of preventive organization

BY PATRICIA SZYMCZAK

We one-person-shop folks are the general practitioners in the field of university relations. As the G.P. of an alumni office, I've diagnosed several ills and have discovered cures that have improved our well being. Now I'm prepared to share my prescription for good health. No matter what your complaint, a dose of old-fashioned organization is sure to help.

File therapy

At Northeastern Illinois University, our filing system is the backbone of our operation. We have spent many hours over the years organizing our files into several basic categories. These include: Alumni Biographies, Publications, Alumni Association, Events, University Departments, Forms, and the like. Here are six time-saving tips we've learned along the way:

1. *Create one central file.* Resist the urge to have files you are not using on your desk or bookshelf. You'll save yourself and others countless hours of searching if you have everything in one central location.

2. *Keep up with your filing.* We have an office rule that we must complete the day's filing by the time we leave for home. This eliminates overflowing file boxes and saves time looking for material.

3. *Use a cross-filing system.* This is especially helpful when you cosponsor events with other departments. Put one copy in your program file and one in the department file.

4. *Be a selective saver.* If at all possible, find some middle ground between the circular and central file. Don't throw everything away, but don't save everything either.

5. *Keep the original artwork.* Many times you will need to reorder a flyer, announcement, or brochure. At other times you may wish to reuse artwork. If you save the original, it will be there when you need it.

6. *Label pictures.* Nothing is more aggravating than to pull from your file a picture taken five years ago at an alumni event and find it unidentified and undated. Prevent this by labeling photos immediately.

Put your records on a reducing plan

Many of you now have your own computer system or you are considering having one installed. Computer support on campus is relatively new; you have no doubt wondered whether it is a help or a hindrance. Along with the convenience of the computer comes a proliferation of paper and punched cards in your office. Also, as

the numbers of your alumni swell, so do your printouts.

What do you do when the by-products of your spiffy new system threaten to take over your office? One solution we came up with was the computer output microfiche. We found that its advantages clearly outweigh the disadvantages.

On the positive side are your savings. It costs as much to produce the first copy of fiche as to print the report on paper. When you get into multiple copies, however, you begin to see real savings. Each fiche, which contains approximately 279 pages at 48 percent reduction, costs 15 cents to reproduce. Printing the same amount on paper would run at $2.

You can create archives and extra cross-files on microfiche without turning your office into a giant filing cabinet. Since fiche take up so little room, you can keep a copy of your file in another location. Should something happen to your office, you would not have to start over from scratch. You also can take the report and a portable reader with you when you travel to alumni club meetings or phonathons.

On the negative side are some inconveniences. You are not able to correct the report manually. Also, the number of people who can use the report at the same time is limited to the number of readers you have in your office. Last but not least, security can be a problem because microfiche are so easy to carry off.

A cure for common correspondence

Once you've streamlined your filing and record-keeping systems, it's time to tackle your mail. Even in "small" alumni offices, the volume of correspondence can be staggering.

We discovered several years ago that it wasn't feasible to write personal answers to each request that came into our office. Yet, using form letters with "Dear Mary" typed in did not seem like a very warm alternative. So we came up with three cards that allow us to add personalized messages:

- "Thanks For Filling Us In";
- "We Read About You In The News"
- "Thank You For Letting Us Know."

People who make contributions to the annual fund automatically become active members in our Alumni Association. Upon receipt of each gift, our office sends the alumnus a folder with his or her new I.D. card. In the past we used to send a letter. Because typing in a name and address was time consuming, it sometimes took several days, if not weeks, to get the cards to our members. Our new format has cut our turn-around time down to one day. We say:

- "We're Glad You Joined Us."

We have a card that helps us trace lost alumni. In addition to requesting address corrections from the post office three times a year, we send out tracers:

- "Help, We've Lost A Friend!"

In order to respond quickly to requests for information from alumni, we have created a standard letter book. I picked up the idea for these letters at a CASE conference a few years back.

Finally, we have a form that makes those alumni "pop-in" visits a good time to update our files. Facts we pick up during our chats go down for posterity—or at least for my successor—on the Alumni Visit/Call Sheet.

A well-organized small shop will help keep your alumni association healthy and happy. Take it from me: Practice preventive organization. CASE

MAXI-PRODUCTIVITY IN MINI-SHOPS

BY NANCY L. MOHR

In a small shop, productivity requires adaptability. Seven urgent projects may arrive in a morning. Or our headmaster may announce that an important schedule has been changed the day after we put it in the mail to alumni.

No organization dealing with human beings is without its unpredictable moments. The best-run office is as vulnerable as the fledgling operation. But if you respond to crisis or work overload with a sense of humor, patience, and common sense, you'll come out ahead.

The basic make-up of an office plays an important role in total productivity, especially in a small shop. It isn't always easy to find people whose work habits are truly compatible, but a healthy respect for one another's abilities is an important ingredient for success.

For example, in the two-and-one-half-person development office at Upland Country Day School, there are three distinct personality types:

- Redheaded Margie Alonzo erupts when the computer has evaded her commands one too many times. She produces mountains of typing, adds her share of subtle humor, and often provides a simple solution when we've spent too much energy searching for a complicated one. She also works well under pressure.
- Wendy Reynolds, on the other hand, is our unflappable Englishwoman. She doesn't mind pressure as long as you let her know it's coming. She keeps excellent records, has good instincts about people, and solves little problems before they escalate into big headaches. Repetitive tasks like organizing board meetings and checking lists for solicitors land on her desk.

Nancy L. Mohr is director of development and public relations at Upland Country Day School, a private, coeducational independent school of 222 students in Kennett Square, Pennsylvania.

- I admit to being a project-oriented person. Even when there are several going at once, pressure rarely bothers me. Repetitive tasks, however, try my patience. Spreading the responsibilities of the office among us, we form a good team. Because we respect and like each other and generally enjoy working together, we generate a sense of cooperation that contributes to productivity.

Beyond striving for teamwork, how do you get the most from a small staff like mine? Here are suggestions:

1. *Create a month-by-month plan for your office.* This minimizes pressure. Every day brings unexpected work, but if you know which assignments are coming up, it is easier to slip in the extra jobs. When you plan a mailing, set specific dates for preparation, addressing, and mailing. Decide how many mailings you can prepare and take to the printer at once.

Also decide whether you can produce some mailings in-house. Always compare the hours required by the in-house person with the cost and reduced workload that result from using outside help.

For example, Upland sends many invitations to past and present parents, alumni, friends, and members of the community encouraging them to visit the campus for special occasions. Traditionally, these mailings demand a fair number of design and paste-up hours.

This year our talented art teacher contributed an excellent series of drawings appropriate for many different occasions. Preparing invitations is now a matter of choosing the right drawing and achieving variety with changes of paper stock and copy. We've cut production time and staff involvement and won many compliments.

2. *Look closely at the potential pluses and minuses of projects.* Before the staff tackles any project I ask myself: How do the demands on the staff balance the ultimate rewards? Is the timing right? Is there competition for the time period or the focus within the school community or the outside community? What is the potential support (financial and volunteer labor) from our constituency?

3. *Get advice from the top.* Finding the best time to capture my headmaster's attention helps me launch good ideas. Rather than settle for brief conferences on the run, we set up a weekly meeting. The business manager is included in the meeting, too, for our areas of responsibility overlap. We discuss the status of current projects, offer new ideas, and present possibilities for PR and student recruitment.

4. *Anticipate possible areas of misunderstanding.* Clarify issues before they become problems. An ear to the cocktail party circuit catches rumors early in the game. Positive response early is far better than a defensive position later.

5. *Debrief after a project.* Taking notes on last time and setting up procedures for next time helps you avoid having to reinvent the wheel.

6. *Provide first drafts.* Whether a committee is working on a case statement or your president or school head needs to write a basic annual giving thank-you note, you can help by supplying a draft. Suggestions, additions, and deletions are also easier when people don't have to start with a blank piece of paper. Everyone will work more constructively in less time.

7. *Maintain a quiet office environment.* If your staff has too many interruptions, productivity dwindles. Make certain your office is removed somewhat from the madding crowd and that you have adequate workspace.

Although our office moved several years ago to a quieter and larger space, we have since filled that space. Nothing can damage ongoing productivity like crowding. While we are considering a second move, we are staggering work hours so that we generate noise and activity at different times.

All in all, achieving high productivity in a small shop involves effective management, innovative thinking, and more. It requires consideration and understanding within your work group. Every ideal productivity plan in the small shop begins and ends with cooperation. CASE

3

productivity

getting the job done

GETTING IN GEAR

Warren Heemann on the sticky problem of measuring fund-raising productivity with clockwise precision

BY VIRGINIA CARTER SMITH

When CURRENTS wanted to talk with someone about productivity in fund raising and institutional relations, we immediately thought of Warren Heemann, vice president for institute relations and development at Georgia Institute of Technology. Heemann, fund-raising trustee on the CASE Board, edited the Jossey-Bass sourcebook, Analyzing the Cost Effectiveness of Fund Raising. *In this interview, Heemann makes clear his view that fund raisers and PR professionals should be concerned with much more than gift income and media relations/publications, respectively. At the same time, he argues persuasively for setting goals and systematically evaluating productivity. Editor Virginia Carter Smith, whose CASE portfolio includes institutional relations and publications, interviewed Heemann.*

CURRENTS: I am not an expert in educational fund raising, so some of my questions may sound naive, but I am interested in knowing how productivity is or can be measured in fund raising. And, more to the point in regard to my area of responsibility, how can we use those techniques to measure productivity in university relations?

HEEMANN: It seems to me there are two ways of measuring productivity in fund raising and in all other advancement work, including university relations and alumni affairs. The first of these is to compare dollars spent with the resources generated for the institution as a result of that expenditure. The second is to measure your accomplishments during a given period of time—that is, how many of your objectives you achieve.

I assume that the new *Management Reporting Standards for Educational Institutions: Fund Raising and Related Activities* is the tool for achieving the first....

It is an important tool, but only one of several that can and should be used to measure fund-raising productivity. Those of us who served on the CASE/NACUBO committee that developed *Standards* became aware early on that, by providing the basis for developing national cost/benefit standards for educational fund raising, we were creating the potential for abuse. Institutions vary widely in potential. Each has its own set of barriers to high performance. It would be unfortunate indeed if the trustees at one college decided that to fire its director of development because there it cost five cents more to raise a dollar than the national average. It would be just as unfortunate if that same unfortunate director of development decided he or she was doing well in the next job because this college was spending five cents less than the national average to raise a buck. One has to keep one's eye on the net. Clearly, it's better to spend $300,000 to raise $1 million (30 percent) and net $700,000 than to spend $30,000 to raise $300,000 (10 percent) and net only $270,000.

Here's a question that intrigues me: As you increase staff and budget, when does the law of diminishing returns set in? When does the return diminish to the point where further investment is not justified? Should an institution continue to increase its investment as long as it can raise more dollars than the actual added investment? Putting it another way, what ratio, gifts versus investment, should we maintain?

That's four questions, and I've asked them of myself in the past. I believe the answers are found more in the realm of psychology than mathematics. I recall listening to a con artist who raised funds for, I believe, some health service agency defend the fact that $980,000 of the $1 million in donations raised went to his fund-raising agency. He said that he didn't understand why people were upset. After all, the health service agency had $20,000 it wouldn't have had otherwise. I sense that donors begin feeling resentful if less than 70 to 75 percent of their gifts find their way to the objective of their philanthropy. There appears to be little or no resentment with fund-raising costs at 15 cents on a dollar; perhaps a bit more resentment when costs reach 25 cents.

Further, one has to be sensitive to the size of the development and public relations staff, its productivity notwithstanding. Obviously it wouldn't do to have a fund-raising staff of 50 at a school with a faculty of 100, even if costs were below 15 percent of dollars raised. Also, it may be *logical* to increase the development staff during a period of faculty layoffs because of budget cuts, but such action is not necessarily wise.

At the other extreme, aren't there institutions that could vastly increase productivity just by increasing staff and development/alumni/PR investment—provided the investment was made wisely?

I have no doubt of that. My somewhat informed guess is that 98 percent of the schools, colleges, and universities in the country would benefit markedly in hard, expendable dollars by an increased investment in their development and public relations programs. A 15 percent cost of fund raising is one way of describing an investment producing a 567 percent profit.

And yet most presidents and presumably the boards to whom they answer don't see it that way.

The reason, I believe, is that we are not very adroit in making our case. Not enough of us gather data, do research, analyze market potential in a manner that is specific, measurable — and persuasive to our presidents and boards.

What kind of data? What kind of analysis?

We could talk on that for a couple of hours. Let me say just this: We should know not only what our total fund-raising costs are but also the cost of each program. Further, it is not enough to know how much you are investing in the annual giving program. You also should know how much each market segment of your annual giving program (alumni, parents, friends, local business, and so on) has given and the cost of rais-

ing each amount. In order to develop this data, you have to have a system of accounting that breaks out both personnel costs and other costs by each element of your program. We find at Georgia Tech that we have about 25 discrete fund-raising programs for that many different market segments, and we are working to set up budgets and measure costs for each. It might seem a formidable task, but it isn't too hard. Bob Teitelbaum has explained one way of doing it in his article "How to Find Out What It's Really Costing You to Operate All Those Fund-Raising Programs" in *Analyzing The Cost of Fund Raising*. [This paperback, edited by Heemann, is available for $8.95 (postage prepaid) from CASE Publications Order Department, Box 298, Alexandria, VA 22313. — ED.]

All this is well and good for fund raising, but what about university relations and alumni affairs? You might be able to segment costs, but you don't have the same gift dollars to place against them to measure benefits. The benefits to a university of a media relations program, for example, are harder to measure.

I agree, to a point. Give me a moment to get up on my soapbox.... It is more difficult to quantify the achievements of a university relations program, but it's certainly far from impossible. Some have proposed using gift revenue to measure the effectiveness of university relations as well as fund raising. John Leslie endorses this concept in *Focus on Understanding and Support: A Study in College Management*. But I personally have never felt comfortable with the idea of using fund-raising results as the sole measure of the productivity of a university public relations and alumni affairs program. We all know that a good university relations program does much more than support fund raising. At public institutions, it also helps secure increased appropriations, as an example, and there are some really big bucks involved in that area. Also, it may be instrumental in producing other revenues — federal grants, local government appropriations, auxiliary enterprise income, and, not insignificantly, tuition by boosting student recruitment.

But I know a good university relations program does even more than produce dollars, as significant as that may be. We have other responsibilities such as internal communication — keeping faculty and staff well informed, maintaining a sense of pride in the institution.

I believe that the goal of every good university relations program must be to increase the human as well as the material resources of the institution.

In addition to increasing gift revenue, appropriations, tuition, and auxiliary enterprise income, we must also work systematically to increase human resources: better students, better faculty, better staff, better alumni. And the increase in the quality of those resources brought about by the university relations program can be measured — assuming university relations has developed programs that are actually working to effect an increase.

Measuring increases in human resources is not as easy or as precise as counting dollars, but it can be done. You can measure increases in the quality of the student body by comparing freshman SAT scores from year to year. You can measure improvements in the credentials of faculty, and you can note a reduction in the loss of key faculty.

I take it that the measurement of the knowledge and attitudes of alumni and the attitudes of nonprofessional staff and so forth would be done through opinion polls, through market research.

As well you know. The same questionnaire might be sent to a different sampling of alumni the first, third, and fifth year of a cycle to measure any improvement. We know there has been a promising increase in the use of market research at colleges and universities. I am not certain, however, that it is being used very much yet to measure results — that is, productivity.

Let me play devil's advocate. Many of the areas you've cited are outside of institutional advancement. Even if some of the academic officers allowed us to get involved, it would be tangentially. Take faculty recruiting as an example.

I think you are right in the main, but every institution offers so many opportunities to get involved. None of us should feel lasting frustration because his or her offer of professional assistance is rejected. I'd say go to the places within your institution where you know you and your staff can be of assistance. Develop a good marketing strategy, then measure and document the results. Establish a track record. Opportunities will certainly multiply. It may take time, but I am confident that in the years ahead our advancement offices will evolve into the "full service" marketing arm of our institutions.

You mentioned at the outset of this interview that productivity can be measured two ways. One is by the dollars spent compared to the resources generated, which I understand to be both human and material. The other is to assess the success one has had in achieving what one has set out to do. In the time we have left, can you talk about the second measure?

Well, the best-laid schemes o' mice and men gang aft a-gley. As we agreed earlier, our institutions vary considerably in their potential to generate resources. We can't all raise what Harvard does. Improving the quality of the faculty may be a long-term effort. Reducing the turnover of nonprofessional staff at a small private school in a major metropolitan area may prove close to impossible. What is important, it seems to me, is to take one's best shot. The trick in this, though, is deciding what constitutes one's best shot before entering the fray. That is by planning.

Go on.

When establishing a system of management by objectives, one is supposed to first write out the goal of the operation. I would argue that the goal is the same for all of us in university relations and development: "to increase the human and material resources of the institution."

Next we should write out the objectives of the program in *quantifiable* terms: for example, to increase annual giving by 12.5 percent; to add 30 new documented estate commitments; to improve the average SAT scores of freshmen by five points; to improve the knowledge of the college among alumni by eight points as judged on an alumni questionnaire; and so on.

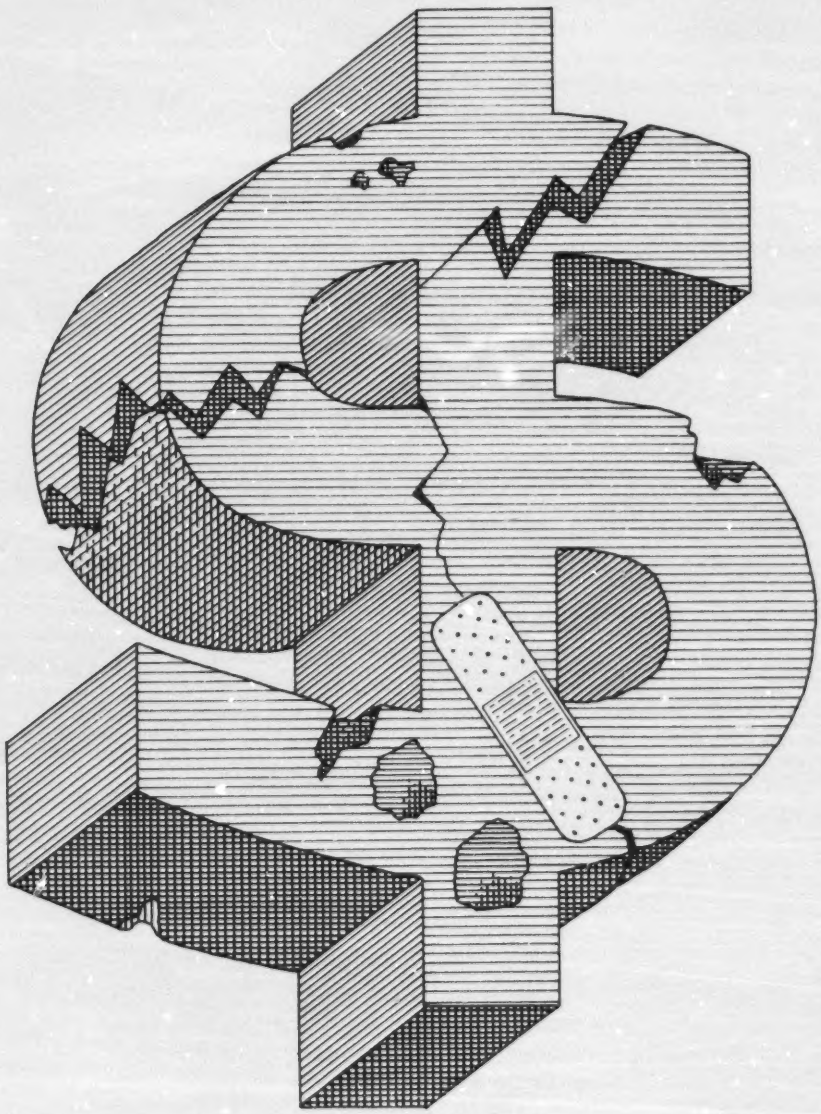
The third stage of the process is to define what tasks must be completed to achieve your objectives. These might

include: starting a new major donors club at the $5,000 level; hiring a full-time staff member for deferred giving; redesigning the admissions literature and improving and promoting the tours of the campus; increasing the number of issues of the alumni newspaper.

By checking that list periodically and running a tally at the end of the year, you can get a pretty decent line on your productivity. But the list must be prepared conscientiously, realistically if ambitiously, and well before the year starts. Making and working at such a list is vital for those who work in university relations. It has been traditionally such an amorphous responsibility that you are called upon to do all sorts of things on short notice. This fire-fighting wastes your energies. Having a goal, a set of quantifiable objectives, and a list of related tasks may make all the difference between managing your program and having events and other persons manage it for you.

Finally, how can a VP or director of development make the case to the president that more staff or budget would bring greater productivity?

I don't think there is any single solution to that problem. I do know that your objectives and the tasks necessary for their achievement should be developed in collaboration with not only your own staff but also with the president and other colleagues in the administration. Ideally, all of these top leaders should understand the stake they have in the successful achievement of your objectives and the new resources they will generate for the school. Then, of course, you must perform, produce. If you say you can produce resources for the school, if those resources are considered valuable, and if you indeed produce and can document the results, greater budget support should most surely follow. Beyond that, we have to scheme, play politics, hustle — do whatever we can — secure in the knowledge that we can repay to the institution the investment many times over. CASE



☑ TEST YOURSELF!

Use this checklist to assess the strengths and weaknesses of your fund-raising operation

BY CHARLES H. WEBB

Roger Leyonmark/*Technology Review*

Think about it: Does your fund-raising operation meet its potential? This quiz will help you see if something in your resources or methods keeps you from measuring up.

What policies and approaches prevent a fund-raising program from producing up to potential?

I recently completed a Ph.D. dissertation that identifies many barriers to fund-raising productivity and, at the same time, points toward common characteristics of productive fund-raising operations. It's the barriers that give us problems, so for this discussion let's focus on them.

The following statements are based on my findings of typical obstacles to fund-raising productivity. Read them over and check the statements that apply to your operation. That way you can assess the factors that stand in the way of your efforts and, in the process, identify your office's strengths.

1. Problems with your organization's structure and resources

☐ Your institution's chief development officer has few years of professional development experience.

☐ There are not enough professionals and support staff in your operation.

☐ The president, the director of public relations, the governing board, the chief development officer, and the foundation board of directors are *not* involved in establishing overall administrative policy for the fund-raising program.

☐ Your operation's goals are rarely achieved through management by objective (MBO) or a similar variation on this management technique.

☐ Your institution's president is *not* involved in development program activities. (These activities include providing

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effective leadership; seeking financial support; identifying, recruiting, and involving volunteer leadership; soliciting potential donors; evaluating fund-raising programs; and establishing fund-raising policy.)

☐ Your institution's administrative personnel (excluding the president and development office) are *not* involved in development activities. (These activities include those listed for the president, plus providing financial support.)

☐ Your institution's faculty members are *not* involved in development program activities. (These activities include: seeking financial support; identifying, recruiting, and involving volunteer leadership; soliciting major donors; evaluating fund-raising programs; and establishing fund-raising policy.)

☐ The support staff (outside the development office) is *not* involved in the development program activities of the types outlined above.

☐ Your volunteers aren't involved in program activities. (These activities include: providing effective leadership; providing personal financial support; seeking financial support; identifying, recruiting, and involving volunteer leadership; soliciting potential major donors; and evaluating fund-raising programs.)

☐ The chief development officer doesn't report directly to the president. The two meet to discuss development activities or issues less than once a week.

☐ The chief development officer isn't involved in total institutional planning.

☐ The development office isn't effective in communicating its role to the institution and its most important fund-raising constituencies.

2. Underutilized fund-raising constituencies and sources

☐ Alumni, nonalumni friends, business, industry, and private foundations are not important constituencies in providing philanthropic support for your institution.

☐ Limited development time or money (i.e., program emphasis) is devoted to major gift programs or capital campaigns or both.

3. Inefficient fund-raising methods and techniques

☐ The public relations office does not actively assist the development office by identifying and publicizing institutional activities that might be considered important by the community and prospective contributors.

The method: How I identified the barriers

When I chose a dissertation topic for my Ph.D. in higher education administration at Michigan State University, I was challenged by the research contribution of William Pickett, vice president of university relations at the University of San Diego. [See "What determines fund-raising effectiveness," CASE CURRENTS, January 1982—ED.]

I decided to do a follow-up study on factors that aided or interfered with fund-raising productivity. My reasoning was that we development professionals have relied too long on hunches. We haven't studied fund-raising effectiveness systematically. As a result, many of us have developed successful methods and techniques while others of us have struggled and stumbled. We've seldom known for sure what factors have made the difference.

As part of my study, I identified a panel of nationally recognized experts and asked them to draw up a list of characteristics of an "ideal" development program. Although the panel didn't unanimously agree on each criterion, the experts reached general consensus for each characteristic I included in the questionnaire that I sent to each participating campus.

In order to reflect the "true" productivity of each institution, I used the methodology developed by Pickett. It helps prevent unfair comparisons because it's based on gift income compared to fund-raising potential, not gift income alone. (Although gift income is the usual measure of success in development, used alone it may penalize the small institution. Such an institution might be doing everything right and still not raise much money because of its limited potential in terms of its number of alumni, location, and other factors. By the same token, the fund-raising program and techniques of large institutions could be much less than ideal and yet the institution might be raising considerable gift income.)

When I conducted this study, I was assistant vice chancellor for alumni relations and development for the State University of New York, which includes 64 individual campus units. In my study, I used four university centers, one health science center, six arts and science colleges, three agricultural and technical colleges, and two community colleges — all in the SUNY system. All had had development programs for three years or more, and all had a professional development staff.

Using Pickett's methodology, I was able to classify the SUNY institutions in my study as underproductive or overproductive based on whether they produced less or more income than their potential would predict. I found that seven institutions in the sample were overproductive, and nine were underproductive—CHW. CASE

It's crucial to monitor a program's progress in keeping records and processing gifts.

☐ The development office isn't active in cultivating or emphasizing corporate/business matching gifts.

☐ The institution doesn't consider its public image important.

☐ The institution spends insufficient time or money to improve its public image.

4. Poor record keeping and gift processing

☐ Alumni records are updated infrequently.

☐ Prospective donors are not rated according to their giving potential.

☐ The institution has insufficient records concerning the occupation, giving history, and other pertinent facts concerning prospective contributors.

To see what your institution should be doing to become overproductive in development, just reverse these statements. I found that the institutions that raised more money than their potential would indicate they should had policies and programs that were exactly the reverse of those of underproductive campuses. I'm not saying that other characteristics might not also be important, but the policy-related items listed above emerged as the crucial ones in my study.

Those of us in development have been advocating many of these policies all along on the basis of common sense. Now we can advocate them even more enthusiastically because we know our hunches are soundly based. CASE

A CAST OF THOUSANDS

Recruit everybody—volunteers, staff, students, faculty—to make an alumni program produce

BY ELAINE PRENTICE AND SALLY RODGERS

If you want better returns in alumni support and participation, put your money on people. That productivity principle has paid off at Whitman College, and we think it can work for you.

We've found that spending money, time, and energy to motivate and train volunteers; educate staff; and involve students yields rich dividends.

Our score card

At Whitman, the alumni staff supervises a wide range of projects including alumni meetings and reunions, off-campus seminars, an alumni college, and the alumni fund. We involve alumni extensively in student recruitment and in a far-reaching program of vocational internships for students.

Our graduates are more active than ever before. Alumni fund participation, now 45 percent, has increased by 7 percent in the last two years. Whitman has more qualified applicants for admission than ever before. Participation in reunions and regional alumni activities has increased dramatically over the last five years. And last spring 50 percent of the 50th reunion class came back to campus. We do all of this with an alumni staff of two professionals, plus a third professional who devotes one-half time to the alumni fund, two support staff, and four part-time students.

We attribute this productive program to our policy of involving volunteers, students, and staff in rewarding enterprises. Let us share with you some pointers on getting the most from your investment in your alumni program.

Use volunteers as staff-stretchers

As student numbers decline and budgets are cut, volunteers will play an ever more important role. To make maximum use of volunteers, keep these guidelines in mind.

1. *Know the volunteer market.* The volunteer force is changing. You will need to enlist a more diverse group of supporters in the years ahead.

Fewer women will be "professional volunteers." Their time will be limited by their career responsibilities. Balancing this somewhat is the fact that their experience in the professions and business will add to their effectiveness as volunteers.

Young graduate talent is waiting to be tapped. We consider the devotion of articulate, bright young alumni volunteers to be one of Whitman's strengths.

2. *Show that you're sincere and serious.* Convince volunteers that their contribution is crucial. Show that their

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efforts are completely supported by the administration, the alumni association, and the president of your college.

When you invite a graduate to join a committee or board, emphasize that it is a working committee, not an honorary group or social club. Mobilize the committee for action. Build enthusiasm. Increase the volunteers' productivity by setting specific goals for them to meet and by giving them the tools they need to work with.

Offer proof of your sincerity by paying volunteers' expenses to attend board meetings and training meetings on the campus. Our alumni are spread across the country, and we are located far from major metropolitan centers, so we pay air fare and lodging expenses for volunteers from as far away as New York. We think it is vital to update their perceptions of the college.

Maintain personal contact. Whitman's alumni fund representatives receive monthly letters from the fund director and from the fund's volunteer chair. Our staff travels frequently to visit with volunteers.

3. *Inspire and educate your volunteers.* Hold individual training and planning meetings for volunteers working in each area of responsibility. Then bring all of your volunteer leaders together on campus for a well-planned workshop once a year.

Our alumni and admissions offices organized an annual two-day program of meetings and social events for alumni area activities chairs, reunion chairs, alumni fund class representatives, and alumni-admissions representatives.

We thoroughly acquaint the alumni workers with present-day Whitman, build their enthusiasm, and arm them with the facts and figures they need to carry out their mission. Whitman pays expenses for even this large group.

Alumni leaders attend classes of their choice; join faculty members for informal discussions; and hear talks by the dean of faculty, dean of students, vice president for financial development, and others. Our staff conducts sessions on their specific areas of responsibility. Tours of the campus, a visit to the college farms, and social events round out the program.

Right on the spot — and for months and years afterward — we can see the benefits in terms of increased dedication and support. These volunteers make it clear that they're willing to use their time and creative talents for the benefit of the college.

Invest in staff renewal

Volunteers lose enthusiasm quickly if they sense that you, the alumni professional, lack information or enthusiasm. As a result, your own continuing education becomes another good investment. To provide enriching experiences for yourself and other members of your staff, you can:

1. *Attend meetings.* To learn from other people in the business, we regularly attend CASE district conferences and the Annual Assembly as well as specialized workshops. Rarely do we return without new ideas.

Convince your volunteers that their work is vital. One means is to pay their expenses for on-campus training sessions and board meetings.

2. *Visit other colleges.* We meet with alumni administrators of other small colleges in the Pacific Northwest. In addition, our director is in touch with his counterparts around the country through CASE, the Small College Alumni Directors (SCAD) organization, and other groups.

Whitman also sends staff members to visit colleges that do things well. This year, our annual fund director made a tour of six liberal arts colleges in the East to find out how they have built their strong traditions of giving. And as we write this, our alumni director, Gordon Scriber, is touring colleges including Pomona, Grinnell, Hamilton, and Colorado College to see what makes their programs successful.

Involve students

The participation of young graduates brings energy and enthusiasm to your alumni program. To build a cadre of committed young alumni, you need to nourish their connection with your college while they are still on campus. For example, you can:

1. *Get seniors involved.* A few years ago, Whitman faced a major problem. Graduating seniors had no real sense of class identity. Because classes chose to have no officers or other leaders, there were no handy class representatives to the college after graduation.

We took action. We promoted the election of eight seniors as a committee to organize class activities during the senior year. Now, picnics, dinners, faculty-student receptions, guest speakers, and other ventures draw the seniors into working and participating for the benefit of their class and the college as a whole.

In formal meetings with the committee to plan events, we introduce them to the role they can play as alumni. After graduation, this nucleus serves as the vanguard of the class's volunteers.

2. *Introduce students to your organization.* Another way to bring seniors to the alumni office is by handling the printing and sale of graduation announcements. At Whitman, the announcements are designed by students working with our staff and are printed in-house to save the seniors money. This gives us a chance to become acquainted with seniors we would otherwise never see.

Whitman students do some of the planning and all of the calling for our annual four-day phonathon. The project begins with a goal-setting committee that includes three students. These students recruit others until, with the help of publicity and the promise of modest prizes, about 100 students volunteer. Later, when these students graduate, they already understand the annual fund from the inside out.

Homecoming offers another opportunity to form ties with students. At Whitman, an associated student body committee works with our office to coordinate all student and alumni activities for the weekend.

In addition, we employ students throughout the year to assist in a variety of ways — typing, filing, stuffing envelopes, serving at dinners, acting as

tour guides. We put them in touch not only with our staff but with our alumni.

Strengthen your programs

A final element of alumni association productivity involves your communications with alumni and the activities you develop with and for them. Here are tips based on our experience:

1. *Make your approach personal.* After our class representatives compose their solicitation letters, we print them on specially designed stationery, personalized for each representative. We send the letters back to the class representatives, who sign them. They and additional volunteers add personal notes and mail the letters locally.

We send letters of recognition to alumni who receive civic honors, are elected to worthy posts, or otherwise deserve commendation. Produced on an automatic typewriter and signed by our alumni director, these are fast but personalized proofs of our respect.

2. *Employ the talents of your faculty.* When faculty members travel for professional meetings or sabbatical research, arrange for them to meet with alumni. Thought-provoking seminars, slide-lecture programs, and musical performances are among area events we schedule to coincide with faculty trips.

For local graduates, we sponsor lectures and other programs by faculty and issue special invitations. Professors also conduct challenging mini-classes at our summer alumni college.

3. *Invest in creative events.* If you are having poor participation from a class or group of classes, give them an identity. Whitman held a War Years Reunion for the classes of 1941 through 1951. Included in our planning were the usually poorly attended 30th, 40th, and 45th class reunions.

From the opening communication — a khaki-colored postcard featuring the Uncle Sam "I Want You" poster — to a lecture on war by a revered former college president, we tapped the common experience of these particular alumni. The theme approach worked. We attracted the largest group of alumni that ever returned to campus.

4. *Find the easy but effective way.* Look creatively at every task:

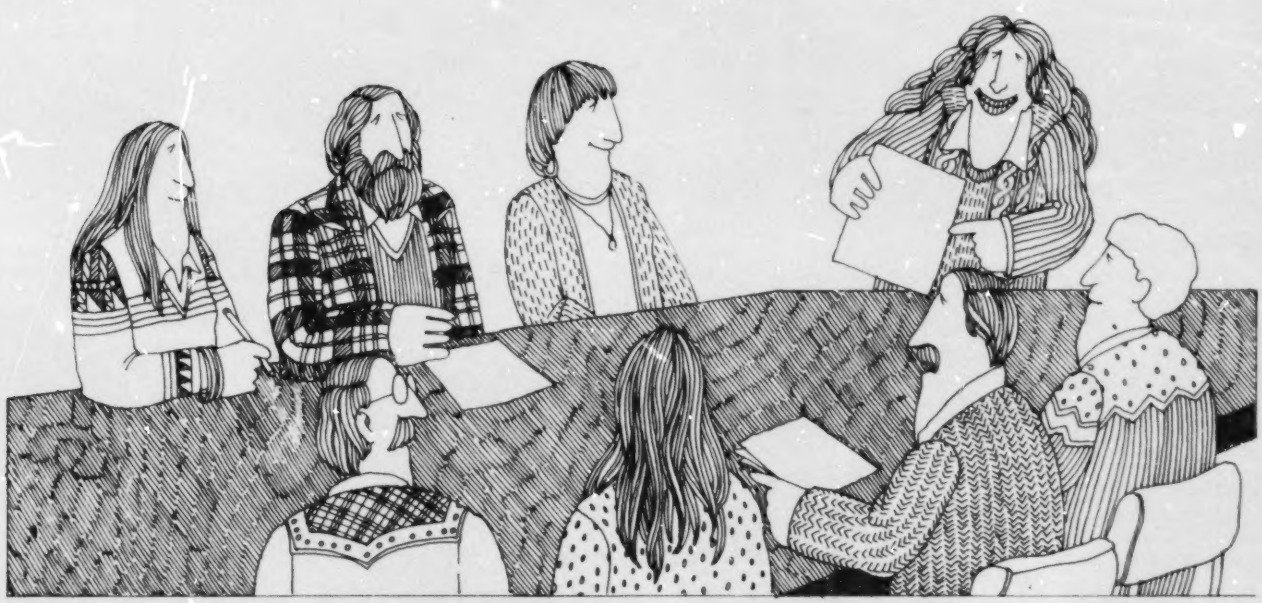
- In your next alumni questionnaire, list volunteer activities and ask respondents to check those they're interested in. Then, when you need a new reunion chairman, you will have some possible volunteers.
- Plan at least eight weeks ahead and send activity mailings bulk rate. Have the computer count and sort your mailing labels by ZIP code so they will be in order for bulk mailing.
- Do self-mailers whenever possible to avoid envelope stuffing. Include special sections in your alumni magazine to publicize some events or offerings.
- Instead of the usual alumni fund letter, send a copy of the computer sheet that lists all the people who have given. Use a printed replica of handwriting at the bottom to ask the question, "Is your name on this list?"

Be distinctive

Before adopting some exciting new idea, do research to determine whether it is appropriate for your situation. Ask yourself what good things in your current program will suffer if you devote resources to a new venture.

Because each school, college, or university's situation is unique, some approaches may be successful for you even though no one else finds them useful. For example, many institutions conduct phonathons at locations away from campus, but because our alumni are widely scattered, we get best results by using student workers on campus.

Improving productivity in alumni programs involves finding just the right combination of budget, staff, and program that will energize your alumni. Your goal: to make them feel good about participating in your programs and investing their time and resources in your institution. CASE



WHY IS THIS WOMAN SMILING?

She knows how to save time in her alumni office

BY PATRICIA S. WAGER

I take as a compliment the assumption that an alumni director's job is fun and games. It's almost true. Not only do I *survive* envelope-addressing marathons, fund-raising events, dinners for 100, late hours, weekend work, and a lack of sufficient help—I *smile*. Why? I have secret weapons: I use shortcuts to save time and achieve my goals.

Planning for action

Before a new college policy brought written goals into my life, I used to form mental pictures of my short- and long-term goals. Now I find that writing down my goals helps me organize my time to meet specific deadlines.

When you set goals, make them measurable and realistic. For example, "To increase membership" is a good goal, but "To increase membership by 10 percent within the next 12 months" is better.

Established goals also provide a basis for evaluating programs—past and present. Before I started the goal program, I wrote an annual report that listed the alumni program's accomplishments for the year. However, this did not force me to ask myself whether I should be considering new programs. Nor did it force me to evaluate my accomplishments in light of the alumni program's goals and objectives for the year. Written goals help you put your programs into perspective.

Written goals will also provide a guide for the alumni program should I move to another position. In a one-person shop this is essential because no one would be left behind to offer assistance.

Plan a whole-year calendar

Once written, I use my goals to determine a calendar. A year-long calendar helps me to allocate my time and tells me when to expect peak periods. Two things I consider in planning my calendar are:

1. *Lead time.* Because I have so many responsibilities to juggle, I deliberately allow long lead times for each program. For example, I know not to plan major events around CASE district and national meeting dates because more than likely I will want to attend. Because I am a one-person shop, I also know that I will have to attend just about every event I plan. So I try to keep major DuPage events scheduled months apart.

2. *Recovery time.* In a one-person shop, it's hard to take vacations, or even days off, because virtually nothing is accomplished in your absence. Also, alumni get discouraged when their phone calls and letters go unanswered for unreasonable amounts of time. For this reason, I don't take vacations in two-week periods. Long weekends and holiday periods are the best for me. When I plan my calendar, I schedule slow time after a big event. In a rested and refreshed state, I can approach each new project with renewed vigor.

Energy-efficient annual events

Annual events are real time savers. It takes a tremendous amount of time to organize an alumni program at the beginning. However, in subsequent years, you can develop and expand the program to meet the changing needs of your constituency. Annual events eliminate the need to start from square one with each event. They also prime your alumni to think about becoming involved in a program at a certain time each year. We have organized these annual events:

1. *Alumni-Faculty Basketball Game.* Held in January or February, this social event gets alumni and faculty involved. It takes minimal volunteer support to organize this, even though volunteers will be players, cheerleaders, announcers, referees, time and scorekeepers, and fans. I handle promotion, securing facilities, planning the program and gimmicks, and hiring a photographer. After the varsity game, the participants attend a beer-and-pizza party at an area restaurant.

Over the past five years we have made these innovations:

- We videotape the game and show it at a post-game get-together on campus.
- We award trophies to each participant indicating the date and event. (One year we awarded two Jim Shoe Awards to the most offensive players in the game. Since they were all offensive, we had to draw names from a hat.)
- One year we offered door prizes with the grand prize being a retreat weekend for two at a local Hyatt House. The hotel donated room, meals, cocktails, champagne, and a movie in the room.
- One year we had a luncheon about six weeks prior to the game. We sparked faculty involvement by handing out training manuals and showing the previous year's game films.

2. *Alumni Wrestling Meet.* This program brings alumni wrestlers back to campus to face the current varsity wrestling team. An alumnus who was a wrestler and the wrestling coach organize it. I arrange printing, mailing, facilities, the award presentations, media coverage, and the reception.

The program has succeeded because an alumnus contacts other alumni. This frees my time for other projects. Special interest group activities work well in a one-person shop since you can recruit alumni, students, or faculty to plan and promote most of the activity.

3. *Bi-annual Book Sale.* We run this fund-raising project on campus, usually from 9 a.m. to 9 p.m. on three successive days. The books we sell come on consignment from a book warehouse. They are sold for 50 percent off their retail price, and we split the gross with the warehouse 40-60. We hold one sale before Christmas and one in the spring. I know not to schedule meetings or other activities on sale days.

Piggyback your programs

By building your program onto prepackaged local community offerings, such as one-day tours, exhibits, and cultural and sporting events, you'll save time and energy. Alumni will enjoy the variety of programming you offer, and you'll benefit from the help that local sales and promotion people give you. Group discounts add incentive for alumni to become involved. Many tours are even free.

Don't overlook your resources in the athletic office, the performing arts department, the student activities office, and the library. The specific department administers the services to alumni and you check periodically to see that all is running smoothly.

It's easy to add alumni events to campus-wide activities. This helps the alumni association gain visibility without a major planning binge. For example, we host a reception area during the College of DuPage Open House. We also supply paint and drawing boards for a community mural at the college's Kinship Day, which is open to the entire community. And for the first time in the history of the college, an alumni representative made a short address at last year's commencement.

Don't forget to piggyback on distribution mailings, too. To save time and costs we hope to issue one-year complimentary membership cards to the graduates attending a commencement reception instead of mailing them as we have in the past. For those not attending graduation, we hope to slip membership cards in with the diplomas when they are mailed.

Inquire with other department personnel about mailings that may go to a group you are trying to reach. Check the admissions/records office and your institutional research department. On a graduate follow-up study conducted by our Institutional Research Department, we included a request for information about alumni association membership. We received a good response and several new members. One year, in conjunction with this project, the alumni association sponsored a raffle for all those who returned their surveys by a certain date. This helped promote the alumni association and increased the response rate for the Institutional Research Department. The items used for the raffle were donated so our cost was zero.

Sponsor programs to get exposure for the alumni association. We sponsor a weekly Peabody Award-winning drama series, "Earplay," on our college's radio station. Each week prior to this show, I host a 15-minute "Alumni Update" program that features alumni announcements and an interview with an alumnus or administrator.

It doesn't take much time to sponsor scholarships. Each year I contact local corporations in person or by letter. I raise enough money to award a scholarship every quarter. An alumni board committee selects the recipients.

The next time someone tells you that alumni administration is fun and games, smile. The fact that we look as if we're having a good time shows that we're true professionals. CASE

BE PREPARED

Plan to get the most from yourself and your PR staff

BY M. FREDRIC VOLKMANN

How can you find the time, energy, and organizational abilities to set up a public relations program that is truly effective and therefore productive?

The answer is simple. Results don't happen. You plan them.

Although there may be many ways to organize yourself and your office for peak productivity, many have found that the best way is to use the management by objectives (MBO) system. One of the reasons for its popularity is that, under this system, you must have written office goals as well as objectives that support your institution's goals.

Obviously, activities alone (clippings, number of TV appearances, number of people visiting the campus) are not a full measure of your PR program's success unless they support carefully-thought-out institutional goals. Under MBO, you can tell what you're accomplishing for the good of your institution and whether you're being productive.

Recently, I surveyed PR professionals all over the nation to find out how they plan and organize their shops for high productivity. I mailed 200 surveys, and 100 professionals — an even 50 percent — responded within two weeks.

From what respondents told me and from my own experience, I've come up with eight steps toward positive productivity. Here they are:

1. Establish either a long-range or a short-range plan.

Without a plan with carefully defined goals, objectives, and activities, you cannot measure or defend your office's productivity easily. How far should you plan ahead? It depends upon the style of your institution and its managers. Some operate with one-year, two-year, five-year, and even 10-year plans.

Generally, the public relations office should develop its plans around the style of the organization. You do this realizing that you will probably have to revise plans for more than two years annually. Ten-year plans are ill-advised in today's rapidly changing world.

Unfortunately, many institutions do not have *any* plans. If yours is in that category, you should establish a one-year plan, with a few long-range objectives stated at the end of the plan.

Art Ciervo, director of public information and relations at Pennsylvania State University, outlined five major goals of his office for 1976-1980. Each goal was supported by several activities to assure its successful completion. His technique is straightforward, simple, and easy to understand. It also lends itself well to annual goal setting. (See his goals on page 34.)

M. Fredric Volkmann is director of public relations at Washington University, a private, coeducational institution of 10,763 students in St. Louis, Missouri.

John Fairman, director of public affairs at Western Illinois University, uses a three-year plan. Fairman breaks out each year separately and sets up different office goals for each year.

Gettysburg College's College Relations division uses another technique by establishing general five-year goals, followed by precise one-year goals and objectives for the vice president for college relations and the public relations director. Gettysburg doesn't list activities under every goal for the vice president and director.

The three-year plan that my old Office of University Relations at Ohio State University prepared is similar to the one that I did at Washington University this year. In addition to my plan, each director reporting to me must also complete a one-year plan. It must give not only details on the task or activity planned to meet the stated objectives but also an explanation of the task — *who will carry out the task* and its *date of completion.*

2. Set priorities, your insurance policy for success.

When I asked PR professionals whether they had a set of office priorities, to my surprise, only 38 percent of the respondents said yes. Nearly two-thirds said no. Yet nearly all of the respondents prepare some type of plan, and 57 percent have prepared a set of goals.

No matter how much effort you put into managing an office by MBO and using plans of action, you may be doomed to failure if your plan doesn't include a clear-cut set of priorities. Without this, it is easy for your public relations office to be sidetracked from its basic goals, especially if you and your staff are inclined to "oil the squeaking wheel" first.

In the set of priorities for my office, the PR version is fairly general and vague, while the publications version is quite specific. The first priority of the publications director is to support external student recruitment efforts. A second priority is to support external fund-raising efforts. Internal publications (programs for departmental events, posters to promote a student play) rank fairly low on the list, even if they are the pet projects of deans or directors. (See pages 34-35 for the complete list of priorities.)

When you do not establish such priorities, you may find yourself focusing more on satisfying the immediate needs of faculty and staff without considering the long-range, external communications needs of your institution. This may lower your productivity because your work does not support your top priorities.

3. Propose budgets to coordinate with your plans.

Unfortunately, few offices combine the budgeting process with development of their set of goals, objectives, and activities. The result is that you often plan budgets before you plan programs, unless your office can plan two or three years ahead.

For institutions that prepare annual budgets, a one-year plan isn't enough. You may have to request funds before you have a clear picture of the communications needs of your institution.

For example, my budget proposals were due in January 1983 for the 1983-84 fiscal year, but my one-year plan for 1983-84 is not due until June 1983. If I waited to do my plan, undoubtedly I'd want to undertake some programs for which I hadn't budgeted in January.

4. Keep track of your progress.

More than once, I have encountered people who go through the motions of planning only because their superiors require it. These people don't see planning as a way to organize themselves and to become more productive.

By contrast, Alice Olick, former director of public relations at Fairleigh Dickinson University, used a precise method for tracking the progress on major office programs. She broke down each month by day and task to be performed for that day. She also noted the office or offices she might involve in those tasks.

Her technique is especially useful for a large staff in which one manager coordinates several programs at once. Regretfully, sometimes such work grids can become so complex as to require the services of a full-time assistant, a luxury for some of us.

Nevertheless, using an organized process such as a production board, a planning guide, or a grid is a logical step if you have a tightly developed plan of action. It is especially useful if you will be held accountable at the end of the year for the successful completion of all the activities you've outlined as necessary to meet your objectives.

Several entries on Olick's guide show four or five offices involved in the same project on the same day of the month. Without this type of coordination, it would be difficult for any manager to think of all the tasks related to any given function at the same time. This is true especially where tasks are delegated and the manager is not expected to know every detail.

I prefer not to use daily or monthly worksheets but to ask each key staff person to file a report on activities completed during the month. These always come in on the first working day of the following month.

By checking over these statements, I can easily compare them to the annual plan to see if we are leaving any projects untouched or if staff members are not paying attention to the objectives they set for themselves. Some institutions also have six-month or annual reviews of the plans to be sure that tasks are completed successfully and on time.

Robert Topor, assistant director of media services at Cornell University, uses a sophisticated program in his word processor to tell him almost daily the status of a publications job. Using this kind of computer program is especially helpful if you have many tasks and a great number of coordinated (but highly related) jobs. This can be useful in helping you meeting deadlines.

5. Control and protect your best-laid plans.

How many deans do you know who have wanted to start up their own public relations and publications operations? How many cavalier faculty have told you they want to print their own letterhead, designed by their spouse or by a student? How many program directors have you known who decided they should have their own logos instead of the university's official symbol? Nothing can more quickly destroy a plan and the morale of your staff (and its productivity) than a few renegades.

(continued on page 36)

Getting started in MBO? Use these tools

BY M. FREDRIC VOLKMANN

Before you can succeed in the world of plan-oriented management, you must understand terms like mission statement, goals, objectives, and plan of action. Here are *my* definitions:

Mission statement: Such a statement answers the simple question, *Why* are you and your office here? In PR offices, this statement must support the mission statement of the institution itself, which likewise answers the question, Why is your institution here?

It is surprising how few PR offices and institutions have clearly defined, concise mission statements that have been officially adopted and approved.

Goals: These statements answer the question, *What* are you and your office here to do? You usually state goals in broad, general terms. A PR program will usually have general goals, and they usually reflect our role of supporting other offices. Typically, your office might have goals to improve student recruitment, to increase support for fund-raising efforts, or to expand communications with alumni, and so on.

Objectives: These statements are not simply a refinement of goals. They answer the question, *What* are you going to do to achieve your mission and goals? Objectives become refinements of goals as well as methods of reaching them.

In other words, if you have a goal to recruit more students, you may list several objectives under that goal. These might be to improve publications for high school seniors, to send more home town releases to communities where your institution usually recruits students, and so on.

Plan of action: This statement addresses the question, *Which* specific tasks and activities are needed to meet objectives? It should also indicate *who* will do the activities as well as *when* and *where* they will occur.

On the facing page, you will see an excerpt from the annual plan of Arnette Nelson, director of college relations at Ripon College. — MFV

Sample public relations goals

One word, goals, pretty well summarizes our operation for 1976-1980. For years Penn State's Office of Public Information had, like many other PR offices at colleges and universities, focused its efforts primarily on writing and distributing news releases. Starting in 1976, with instructions from the president to develop a total public relations operation, we established plans, policies, programs, and priorities that would assist the university in attaining its goals. To accomplish this, we upgraded the professionalism of the staff and redirected their efforts in support of five clearly defined goals:

1. To support all fund-raising efforts of the university, with emphasis on increasing donations from the private sectors and the appropriation from the State of Pennsylvania;
2. To assist the university, in the face of declining birth rates, to recruit students, especially blacks and other minorities and nontraditional students;
3. To obtain more recognition for our educational, research, and service programs throughout Pennsylvania, but particularly in Pittsburgh, Philadelphia, Harrisburg, and other major cities, and also in the national media;
4. To do whatever possible to assist in "personalizing" our large central campus (32,000 students) for students, visitors, parents, alumni, and other groups; and
5. To expand and improve public relations efforts at each of Penn State's 22 campuses.

— *From the Office of Public Information and Relations, Pennsylvania State University, Arthur V. Ciervo, Director. Dated March 1980.*

Sample public relations priorities

While the Washington University Public Relations Office seeks to serve the university in as many ways as possible, the office cannot effectively handle all requests for assistance. For this reason, the following priorities are submitted as a guide for what has greatest importance in meeting public relations objectives. In addition to responding to all requests from the chancellor and vice chancellor for university relations, the Washington University Public Relations Office has the following priorities (listed in order of importance):

1. **National image**
   Improvement in the national visibility, name recognition, and image of Washington University.
2. **Student recruitment**
   Support for the recruitment and admission of new undergraduate, graduate, and evening students.
3. **National campaign**
   Assistance toward meeting the communications and publications needs of programs supporting the $300 million campaign.
4. **Alumni and development**
   Support for other alumni/development programs other than (3) above.
5. **Vice chancellors and deans**
   Efforts on behalf of the external public relations needs of other vice chancellors and the deans.
6. **Departments and programs**
   Furtherance of the other external public relations needs of the departments, institutes, centers, and other academic, service, and research programs of the university.
7. **Internal communications**
   Development of better internal, institution-wide communications that will improve the university's overall self-image and that will, in turn, support a better external public relations program.

8. **Community relations**
Maintenance of current, local public relations efforts through St. Louis news media, campus events, and publications.
9. **Other external PR**
Encouragement of any other external public relations efforts of Washington University, if not mentioned above.
10. **Other internal communications**
Help for the internal communications needs of Washington University, if not mentioned above.
11. **Other tasks**
Performance of any other public relations tasks as may be required from time to time.

Because these priorities may occasionally prevent the Public Relations Office from providing full assistance, every effort will be made either to refer the request to another office or to provide consultation on how the office involved can complete the project on its own.

— From the Public Relations Office, Washington University, M. Fredric Volkmann, Director

Sample goals, objectives, and activities for sports information

Goals	Objectives	Activities
1. Recruitment of quality student-athletes 2. Accurate and thorough coverage of all varsity athletic programs at Ripon College 3. Accurate and complete statistics and records history for all varsity athletic programs.	1. Minimum coverage of each varsity sport—at least line score in area media, box score for football and men's basketball	Phone calls with scores and stats to AP-UPI, Green Bay and Milwaukee TV, and *Milwaukee Journal/Sentinel* Provide dittoed statistics to media and coaches within 15 minutes after home football/basketball games
	2. Streamline and revise Scorecard release format; develop new home town release system to accommodate the change	Shift Scorecard emphasis to preview of upcoming events with synopsis of last week's scores Create standard form for Redman of the Week or outstanding player for HT release
	3. Assemble six feature stories (one every other month) on past and present Ripon sports figures for release to regional or national media	Weekly conferences with coaches and/or Chuck Larson on feature ideas, reaction to releases and publications Keep in touch with area media about upcoming events, feature ideas
	4. Revise format and content of sports guides and programs to include more relevant information 4a. Define which statistics are important for each sport and compile what's not now organized	Complete and mail guides by two weeks prior to first contest 5½ x 8½ mimeo guides with sturdy offset cover 8½ x 14 four-fold program format with stats, field notes, bios, RC Facts Update and correct Don O'Brien's record book (including first edition omissions and all-time records vs. opponents), then include this info each year in guides
	5. Double-use materials as often as possible (admissions-media, media-alumni magazine, etc.)	Consult with coaches, admissions, and media as to their uses of materials

— From the College Relations Office, Ripon College, Arnette Nelson, Director

(continued from page 33)

You can protect yourself by adapting the appropriate section in your operating manual if one exists. Add rules defining the role of the public relations office in publications, news and information, logos and identity systems, and so on. Although it is difficult to impose conformity on an institution, it is feasible to do a better job of coordinating communications and promotions.

We did just that during my first year at Ohio State. Later, we made several other policy changes, especially adopting a new logo and corporate identity system for the institution. Fortunately, Ohio State backs its administrators in matters relating to the operating manual. Once the policies were adopted, it became fairly easy to insist that appropriate offices handle external communications (including publications and news and information).

Unfortunately, many universities do not have operating manuals and do not strictly enforce any rules in the areas of PR and publications. In many cases, faculty and staff find out that public relations services are available and that they should always try to use them. Failure to do so, however, rarely results in any wrist-slapping at larger institutions. At smaller schools, these rules are enforced if there is a strong administration. One warning: All the rules in the world won't guarantee you'll get cooperation. That comes from doing the work better, on time, and with verifiably improved results.

Another way to protect the public relations office from duplicated effort or improperly handled communications is to enlist the help of your business office. At most institutions, business officers control not only the general budget for an office but line-item entries as well. These include funds that might be used to support public relations activities.

When I was at Albion College, we arranged for all publications to be handled through the public relations office by taking two steps. First, we sent letters to all printers within 50 miles indicating that the college would no longer pay for any printing done by their firms without a purchase order before printing. Soon faculty were flocking to the business office to obtain purchase orders.

Then we took the next step. We stated that no publications expenditures could be authorized by the business office without the joint approval of the public relations office. This forced faculty members to come to the publications office to discuss the work to be done.

If we discovered that the publication fell within the external communications role of my office, I could insist that such printing not proceed until I was involved in the project. Of course, these negotiations were delicate, and we handled them with sensitivity. But it did bring about a more effective and systematic publications program.

6. Tell people what you are going to do to them and for them before you do it.

When carrying out a plan, it is important to let others know systematically what you are doing. You should communicate with your staff as well as the people who use your services. This promotes a higher level of cooperation and productivity.

You must have a document to inform clients of the publications office's rules of operation. Such a document not only offers advice on how to proceed with the office, but it also lays down the ground rules. These cover priorities, the time required, costs, and the rules regarding logos and publications. Like the operating manual statement, this publication is educational, but it also provides some protection from cavalierism.

7. Be accountable. (Or, what to do when the smoke clears.)

St. Cloud State University has an unusual employee evaluation form that reads a bit like the list of objectives from a typical office plan. But it has the additional "whammy" of rating the performance of people according to how well they accomplish their objectives. It covers almost every aspect of the work of Director of Information Services Ray Rowland.

For many of us this would seem like needless work, but if you are an aggressive, creative manager, such an evaluation procedure should never be a personal threat. You should welcome it as a gauge of your productivity and a way to find out where improvement is needed. This is true especially because the document is usually prepared by you, the subject. In a sense, it is your contract with your institution and expresses in advance what you plan to do.

8. Maintain a positive office environment.

No evaluation, plan, set of objectives, or mission statement does more than force an office to focus on its purpose and take a hard look at how it achieves this purpose on behalf of the institution. When all is said and done, you cannot have a productive program without a positive office atmosphere. If the atmosphere is negative, you will have a demoralized staff, productivity will decline, and innovation will suffer.

We all know about the "abominable no-man" who constantly says it can't or shouldn't be done. More precisely, John C. Stedman, writing in *Education for Innovation*, revealed ways managers tend to stifle subordinates. Here are some of Stedman's killer phrases:

- "We tried something like that once years ago."
- "That's ridiculous."
- "That's too radical."
- "Let's form a committee to consider that idea."
- "That's contrary to policy."

In other words, careful planning and good management go hand in hand. You must know what you are going to do before you do it, and you must have the people, resources, and leadership ability to pull it off.

Overall, if you heed these eight points for productivity your program will glean results — planned results. And they're the best kind. CASE

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FISCAL FITNESS

Shedding unwanted production time

BY GARRETT SODEN

Recently, sophisticated computer systems — capable of typesetting entire pages with headlines, text, and photo boxes in place—have become affordable even to small users.

When we decided to redesign the Occidental College alumni magazine, I thought it was time to consider computerized pagination with an eye toward cutting production time. Having pagination means that we can go directly from galley proofs that include photo boxes, headlines, and captions to camera-ready pages. We bypass paste-up and do layouts directly on the computer screen. Although the verdict isn't in (we have so far produced one issue), it looks as if this approach has great potential.

But one of the first things I discovered is that pagination is practical only for certain parts of a magazine—those that remain basically the same from issue to issue. Setting up the format for pagination is so time-consuming that it's not cost-effective for the sections that need to remain fluid. Departments, columns, news pages, and especially class notes are ideal candidates for pagination because they vary little in format. Features usually need to be handled on an issue-by-issue basis.

With this in mind, I went one step further and designed our "Front of the Book" section (campus news, reprints of national stories, and so on) to be identical in layout to our "Back of the Book" section (alumni news and profiles). This meant that I needed to create only two formats—one for the front and back sections and one for class notes.

Because I wanted to make layouts as easy as possible, I designed both formats so that articles "flow" one behind another. This eliminates two-column heads, double-column boxes, and other situations that tend to vary and complicate the layout of each issue.

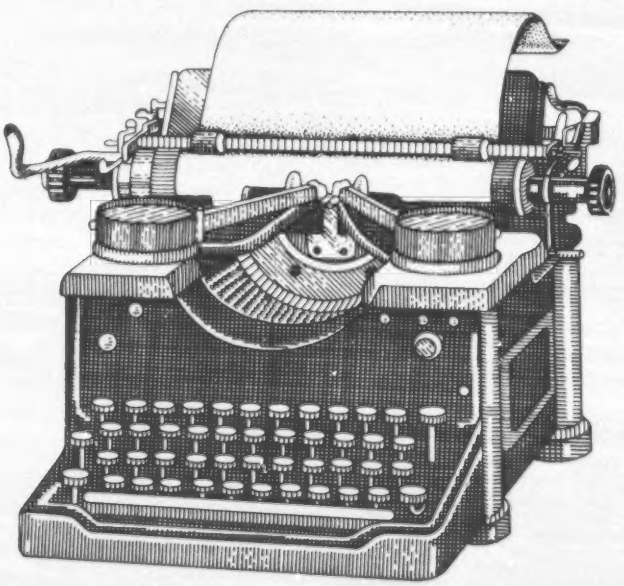
The goal is to have pages laid out within our parameters as copy is being typeset by the computer. These parameters must be as specific as possible and eliminate (or at least establish precedents for) any design decisions. This is why creating the format is so time-consuming.

When we give layouts to the typesetter (who keeps copies for future reference), we measure every space and write detailed specifications: column widths, depths, gutters, leading between headlines and text, and so on. The equipment our typesetter uses is capable of adjusting position in tenths of a point. To achieve the right look, we specify spacing to that degree.

In addition, we're careful to streamline the specifications as much as possible. Therefore, headlines are always the same size, and typeface and leading are always the same too. We also use standardized boxes for photos. We use only four sizes, all based on standard 35mm frame dimensions.

Once the typesetter has our layouts, we can both refer to them and avoid repetitive specifying. For example, when I sent the copy for the "Back of the Book" section, I attached a note that read, "Same specs as 'Front of the Book.'" Because of our detailed specifications, the pagination was fast and easy for the typesetter. We received ready-to-print class notes — 19 pages filled with boxes and special indentations — in two days. The only addition I had to make was spot art to fill the holes the typesetter left when a column of type didn't fill out the page as I had expected.

Although our requirements for pagination might seem to restrict design, in fact they don't. We believe that maintaining a similar look in these departments from issue to issue helps the reader become familiar with the magazine. The time and effort we save can be put into achieving better design for the features. As the designer, editors, and typesetters become more familiar with the process, we expect the flow to be faster and smoother in upcoming editions of our catalogs. CASE



4

productivity

getting motivated

PROFILES IN PRODUCTIVITY

17 great supervisors on getting more from your staff

BY ANNE LOWREY BAILEY

"Some are born great, some achieve greatness, and some have greatness thrust upon 'em," says Malvolio, steward of *Twelfth Night*. And the same could be said of managers in institutional advancement. Some possess a seemingly magical ability to lead their employees on to great deeds; some learn to motivate staff to peak performances only through painful experience; and others, thrust suddenly into supervisory positions, huff and puff and bluff their staffs into great productivity.

If you're looking to improve your staff's productivity, try these tips, which are based on the experience of these 17 veteran supervisors.

Plan for each employee's professional development. "An organization that maintains a plan for the professional development of its employees through continuing education, personal study, and initiative, and one that evaluates, updates, and monitors that plan will be a successful and productive organization. A sense of continuing opportunity for professional and personal growth is an essential ingredient for a productive staff. Employees who sense and appreciate that opportunity will work with a high degree of effort and enthusiasm; they will generate the determination to meet difficult and challenging goals. Job enrichment can come in many forms: assignments of expanding and changing responsibilities, advancement to positions of greater responsibility, and a creative environment for expanding professional skills and knowledge."—LILLIE YOUNG, *Director of University Development, Southern Methodist University*

Express your dissatisfaction. "I strive to guide my staff with openness and respect, to provide them with complete information and challenging work, and to sense when they're ready to be given more responsibility. But at the same time, it is extremely important that I be honest with them when they disappoint me. This 'disappointment' does not come very often, and before I express it I must be certain I am not differing with their decisions merely because of a difference in our styles. It's easier to ignore failure, grumble about it privately, or even do projects over ourselves. But it is only fair to our staff members and to our programs that we acknowledge it when someone else does not complete a task to our satisfaction. This enables the person to be successful the next time."—MARJORIE H. KRAMER, *Director of Alumni Relations, College of Wooster*

Be competitive. "I've found that being competitive encourages greater staff productivity. How do you know if you're competitive? Find out what your colleagues at other colleges and universities are doing. Monitor their best products and show your staff the results of the work done at other institutions. By entering competitions, you and your staff can help your program reach higher, measurable standards. Being recognized by professionals who judge these contests gives your staff a sense of pride in their work. And if the staff believes they are a part of the best program, they are more willing to put in the extra hours and add the extra polish to their tasks. Thus, competitiveness increases a staff's enthusiasm and also enhances teamwork."—BILL NOBLITT, *Director of Publications, Washington University in St. Louis*

Set measurable goals. "We write down rigorous expectations for ourselves—numbers of stories to be produced, cities to be targeted, media to be reached. We keep track of our progress through weekly media contact reports and story lists. At the end of each month, we compile statistics about clippings, queries, and other details of our efforts."—MARTHA HARRIS, *Executive Director of Public Information and Public Relations, University of Southern California*

Set high standards. "Without remotely approaching any breaking points, a sensitive manager can stretch anyone (self included) to more fully realize his or her true potential. Above all, we should never insult the people we supervise by giving them too little to do or expecting less in performance and conduct than they are capable of giving. Looking back on our student days, we remember with the greatest fondness and respect those teachers who gently but firmly stretched us the most. Donors, volunteers, and our colleagues respond that way, too."—CLARENCE JUPITER, *Director of Development, Xavier University of Louisiana*

Develop a tracking system. "We have developed a three-ring binder system to keep track of what we're doing. We have three binders, one for publications projects, one for news releases, and one for everything else. Every project and idea, however large or small, and every telephone request is logged onto the appropriate colored form and filed, either as 'in-process' or 'completed.' Not only does this permit us to keep account of the myriad requests we receive, but it also lets us quickly assess the progress of the project and how long the project takes to complete. These notebooks make it easy to write both weekly and monthly reports."—ARNETTE NELSON, *Director of College Relations, Ripon College*

Express appreciation. "Whether acknowledging a gift from a large foundation or encouraging a volunteer to perform a certain task, I express appreciation for support. When I meet with staff, positive feedback for good work is just as important. Rewarding accomplishments with a 'well done' or providing incentives such as increased responsibility indicates my satisfaction with performance and leads to greater productivity."—HARRY F. MILLER, *Vice President of Development, Morgan State University*

Encourage new ideas. "Managers who want to increase productivity must encourage new ideas that lead to performing tasks more efficiently. Many (if not most) of these ideas will come from the staff members a manager supervises. Managers, too, must think constantly of innovative ways to carry out tasks better or more easily, thus encouraging creativity by example. A word of caution: When you think of a novel way to improve office functions, be sure to jot it down immediately, even if you can't act on it right then. Otherwise, your wonderful idea may fade away, forgotten."—ANTONIO RIGUAL, *Vice President for University Relations, Our Lady of the Lake University*

Try flex time. "I have increased productivity in my

office by arranging work hours around work flow. I ask staff members to work long hours during peak periods, and I give them time off during less busy periods. We are precise about this. For example, a member of my staff worked on a National Endowment for the Arts grant for 75 hours over the normal work period. She then completed and signed a Flexible Time form, which documents the overtime hours and the tasks performed. I approved it. Our secretary will hold the form until my staff member wishes to use all or part of her flex time as leave. I will then grant her the leave, provided no other tasks will be neglected during this period. Given our small staff and constrained budget, we have found this procedure to be very helpful and a boost to morale."—HORACE JEROME TRAYLOR, *Vice President, Institutional Advancement, Miami-Dade Community College*

Permit employees to express opinions. "If employees are free to express ideas, then they will feel free to express problems too. Lack of communication can do more harm to the working environment than anything else. It's not hard work that burns people out; it's unresolved conflict. Consequently, it's crucial to identify problems right away and at least begin working on solutions. Some of the best ideas spring from problem-airing sessions that take place in positive work environments. Working in an environment in which the channels of communication are open is like reading a good novel; it causes the mind and the human heart to open spontaneously. And that's when things begin to happen that are greater than any one individual can take credit for."—JOAN LENTCZNER, *Director of News and Publications and Editor,* Radford University Magazine

Maintain good morale. "Employees who don't like their jobs or their work won't get things done. I try always to comment on good work and to give only constructive criticism. I write at least one or two 'good work' memos a week. At the end of a big project or at the end of the year, I send lots of thank-you notes. We all like to know people recognize and appreciate our work, and when someone thanks us, we work even harder the next time."—BRICE W. HARRIS, *Associate Dean of Instructional Services, Penn Valley Community College*

Automate. "At Northwestern, the offices reporting to the vice president for institutional relations have all moved toward automation. Although we haven't scientifically measured our results, it's clear that the use of computers for storing, sorting, and disseminating data has resulted in significant growth in productivity. For example, word processors have eliminated the need to pay overtime at peak periods, and electronic mail allows individuals at several universities to revise a draft simultaneously under pressures of time. But despite the cost of high-tech equipment, the worker is not only the most valuable but also the most expensive productivity factor. To increase productivity, a good manager must hire people with strengths that complement his or her own, allow them the fullest possible autonomy, and support them for jobs well done. Although automation has great potential for growth in productivity, it will not be realized unless you create a positive atmosphere in the work place."—GRIER DAVIS, *Director of Government Relations, Northwestern University*

Explain why. "A staff member will work with much greater motivation if he or she understands *why* an assignment needs to be done. Similarly, you should make sure your staff understands the mission of your office and how specific projects relate to that mission. By explaining how your employee's assignments relate to the entirety of various projects and the mission of the office as a whole, you will encourage greater personal and professional involvement. And an involved staff that understands what they are doing and why will usually be more motivated and productive."—ANNE D. ROBINSON, *Director of Alumnae Programs, Stephens College*

Combine deadlines with long-range thinking. "We'll publish three issues of *St. George's* in 1982-83. In the fall I sent a list of the topics and the mailing date for each one to our board and our Alumni Council. If you're a procrastinator like me, pinning your plan to the office door gets your big decisions out of the way early, and you find the rest falling into place. Everyone on the staff knows what direction you've taken, and they start to pitch in materials and ideas. It makes production scheduling far easier, too."—THORNE BUTLER, *Director of Annual Giving, Director of Alumni, and Editor of* St. George's, *St. George's School.*

Monitor priorities. "The best way to improve the productivity of good people is to ask them periodically, 'What are your two or three *most* important priorities?' And, 'What steps are you taking to achieve them?' All of us get distracted from our primary objectives. As a manager, I sometimes distract my staff by giving them less important assignments or projects. By sitting down with people regularly (maybe once a month) and reaffirming priorities, you *and* they will keep attention, discussion, and effort focused on the top priorities and action steps. You will also help maximize productivity by keeping yourself and your staff from straying into well-meant but less significant activities. As people gain experience, they can deal effectively with more priorities, but you should still have that monthly review with them to prevent time and energy from being diverted to issues of secondary importance."—GARY A. EVANS, *Vice President for Resource Development, Rensselaer Polytechnic Institute*

Use a soft (furry) touch. "People respond best to a manager who uses a soft touch in fostering a mutually helpful relationship among staff members. I also feel it is important to arrive in the morning before any of my staff and, if possible, be the last to leave. Staff members at all levels notice this. Managers should put in the extra effort and set an example of hard work. In addition, I am convinced that alumni associates will double their productivity when they're working in an informal and pleasant atmosphere. Meaningful compliments and true concern make a big difference. It is a joy for me to hear staff members humming as they walk past my office. Seeing a bounce in their steps somehow instills in me a sense that there is a high level of production occurring."—ROGER K. THALACKER, *Executive Director, Alumni Association, University of Connecticut* CASE

Thoughts on the productive life

BY R. KEITH MOORE

Although I don't consider myself an expert, productivity fascinates me. I've given a lot of thought to the topic and tried many ways to increase my own output and that of my communications shop. Here are some approaches that work for us at Carnegie-Mellon. You might want to try them.

Hire a good secretary

In many ways, a manager's productivity hinges on hiring an efficient secretary. I looked for someone with prior experience in a PR office and found a person who was previously secretary to the director of publications at Columbia University.

In addition to being a good receptionist and typist, she:

- screens out drop-in salespersons;
- constructs routine correspondence;
- interprets my sometimes incomplete directions; and
- sets up my travel itineraries. (She not only makes my hotel reservations but also gives me the name of the reservation clerk who handled the call—and the manager's name in case the clerk doesn't respond effectively.)

Use computers

The main reason our office is so productive involves our use of computer technology. All nine professionals have computer terminals at their desks. They use their terminals to update mailing lists; maintain activity logs; and compose news releases, letters, memos, and articles.

Three years ago, we didn't do home town releases because hand-sorting was too time-consuming. Now we do approximately 1,000 to 1,500 home town features and home town releases a year through list processing. Don Hale, CMU's director of communications, estimates that we do these releases in one-third of the time it takes by the traditional method.

Our writers merge student information (those who won academic honors, for example) and our data base covering newspapers in the university's primary recruiting markets and other geographic areas. The computer sorts according to student's home ZIP codes. We're not the first to use this technique, but we preach its efficiency with the zeal of the newly converted.

To prepare regular releases and article drafts, our writers in the PR office or those stationed across campus (say in the business school or science college) input the first draft. Then our secretary makes corrections on her terminal instead of completely retyping the draft.

Hale, who proofs every release, calls up the release on his Zenith 19 terminal screen. He may switch paragraphs around or modify them swiftly while the secretary prepares the addressed envelopes—by computer. By saving several minutes on each job, we're able to increase the volume of our news output significantly.

We prepare keyline art for our biweekly Campus Calendar on the DEC 2060 TOPS-20 system computer that we share with other administration offices. A second machine, the DEC PDP 11/45 minicomputer, provides most of our word-processing applications via a DEC software package called Word-11. This minicomputer serves the PR Department only.

Here's an interesting note for managers: I can't scientifically document this, but I've observed that, as soon as our staff members started to depend on computers, they began to come in on weekends to practice on them. Now they are requesting terminals for their homes. Possibly as a result of computers, we've cut our PR staff turnover. No professional has left the staff since November 1981. Again, I can't prove this, but I believe that, since we installed computers, our staff members' self-esteem and sense of professionalism has increased. I do know that the amount of work they produce and their enjoyment of doing that work have both increased significantly.

Watch the little things

Every manager has tricks for saving time and being more productive. Here are a few of mine:

- I try to keep phone calls to five minutes; few calls should take longer.
- Contrary to what some time management experts recommend, I take phone calls when they come unless I'm involved in a meeting where continuity is important or drafting an important speech or article. This saves me from playing "telephone tag," which wastes lots of time. James Bair, who has studied the subject for Bell-Northern Research, Inc., says that business officials only complete 28 percent of their phone calls on the first try.
- I try to keep clutter off my desk to cut down on my chances of misplacing an item. This may sound trivial, but with the hectic schedule we PR managers keep and the many small details we must process immediately, it's a big interruption to have to stop and look for something important.
- Because I travel a lot, I log expenses daily from the receipts I always keep in my lefthand coat pocket. On the flight home, I tally my expenses in rough form on a university expense form. When I reach the office, all my administrative assistant has to do is retype.
- Finally, here's something that vastly improves my personal productivity: I schedule an activity almost every week that I especially enjoy doing. One week I may visit a friend at a national magazine or drive across Pittsburgh to visit a colleague at another institution's PR shop. I may browse through the library's shelves of new communications and PR books or stroll through the CMU art gallery's new exhibit.

It's important to me to play tennis or exercise regularly and to spend time sustaining my own creative interests. Too many people ignore the fact that managers can't motivate others unless they feel motivated themselves. cnse

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40 CARROTS

To motivate employees, try listening to their needs

BY CALVIN H. STONEY

It's surprising that many of you in institutional advancement know how to motivate volunteers but don't apply the same principles with your staff. You've learned to keep your volunteers happy and motivated with a generous helping of recognition and encouragement. If you're really smart, you'll treat your paid employees the same way.

It's true that you have a lot more leverage with paid employees; they are likely to take a warning about a demotion or pay cut very seriously. But a constant diet of threats and abuse isn't going to keep them working at their best for long. And you need them every bit as much as they need you. These days, with small institutions maintaining institutional advancement staffs of four to eight and large universities hiring 30 people or more, your success depends more and more on your employees' motivation to do good work.

Authors Herbert G. Hicks and C. Ray Gullett explained the theory behind the practice of motivating employees in their book, *The Management of Organizations:*

> *The key to effective motivation lies in the satisfaction of the employee's objectives through pursuit of organizational objectives. To the extent that employees view the rewards they receive from performance as supportive of their personal objectives, they will produce within the limits of their capacity and within the restraints placed upon them by the organization. Management's task is that of analyzing the* situation *to determine the most appropriate rewards within the total organizational context that will lead to high* productivity.

To help you translate this theory into practice, here are four steps to becoming an effective motivator:

1. Understand and be able to negotiate the relationship between your individual employees' needs and your institution's goals and objectives.
2. Create a work environment that's conducive to employee motivation.
3. Develop a style of management that's consistent and decisive but also lets your employees know you're willing to delegate responsibility and to be fair and supportive.
4. Learn how to use rewards and to encourage and reinforce good work.

Satisfying employee goals

Let me repeat: Motivation to work hard is tied directly to the answer to one question: What does the individual employee get for his or her efforts?

"Individual" is a key word here because you must realize that different employees have different needs. For example, a young person just buying a house may find money so important that he or she will work hard for a raise that will make the payments more manageable. Another person may need to be recognized for doing a good job; he or she will work hard for praise from the institution's leadership. Obviously, you must be sensitive to each employee's needs and strive to see that their work gives them the appropriate satisfaction. Being sensitive to various individual needs is not always easy, but it is essential for motivation.

While there is no one way to learn the needs of your employees, meeting with them on a regular basis can be very helpful. One chief institutional advancement officer I know meets with his employees in small groups to allow them the opportunity to share their concerns and ideas about the department.

Of course, there will be times when certain employee needs are impossible to meet. For example, an employee might demand a salary beyond the institution's ability to pay. Under these circumstances, the employee will have to be willing to compromise — or find another position elsewhere.

Creating the right atmosphere

After recognizing that your employees want to satisfy their individual needs through their work, you must strive to create a work environment that integrates these personal needs and professional expectations.

By virtue of their educational background, people who work in development strive for professional status in their chosen work. They're usually intelligent and have a strong desire to be successful. While they require varying degrees of supervision, they work best when they see themselves as an integral part of the development team. That's why managers who tell their staff members what to do without involving them in the decision-making process will not get the same positive results as managers who do.

To illustrate this point, consider the story a colleague told me about the time she visited a major prospect for her university. During the conversation, she discovered that the prospect knew several things about the school's plans for the future that she didn't — things the prospect had learned at a lunch meeting with a trustee. The chief development officer knew of this meeting and also knew that my colleague was to visit the prospect, but it was not his style to share information. When the development officer asked her supervisor not to let this happen again, he informed her that she would be told what she needed to know — nothing more.

Obviously, this autocratic manager did not believe in involving his staff in the program. His belief severely diminished his effectiveness.

Another obvious point is that a work climate in which you lead a team of committeed employees who feel involved in the total program will produce better results than an environment filled with conflict, mystery, and the general attitude of "That's not my job."

If conflict should arise, the one way to resolve it effectively is to bring it out into the open. Using this management technique, a difference of opinion, for example, can stimulate creative thinking and improve your program.

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Finding a fair management style

Your personal management style plays an important part in creating an effective work place. This style should include such elements as consistency, fairness, willingness to share, openness to feedback, clear and open decision making, and effective delegation of responsibilities.

1. *Consistency.* I once heard of a vice president of development whose staff said he based his daily decisions on what he had for breakfast. Everything that happened to him changed his mind, and his staff never knew what he'd decide to do next.

While the person in this example may be extreme, many managers fail to realize that being consistent and controlled will help the staff know what to expect — and help the staff be more effective. Supervisors who fail to provide consistent direction create uncertainty about what should be done and when to do it. Dealing with such an unpredictable supervisor is like playing a game in which the rules keep changing: It gets harder and harder to win.

2. *Fairness.* If you treat *all* employees with interest and concern, you will create a much better atmosphere than if you seem to have favorites.

3. *Sharing.* When I use this word, I'm not talking about sharing personal or confidential information with the staff. Instead, I'm comparing a supervisor's role to that of a teacher. The supervisor wants his or her employees to learn and grow in their work, and as a result he or she shares knowledge and expertise with them. Another analogy is the coach who realizes that his success is directly related to his ability to motivate the team to play well.

The effective manager knows that personal success is closely tied to the success of employees. It's beneficial to share knowledge and skills with staff members. As they improve, so will your department's productivity.

4. *Feedback.* A key to adapting to new situations successfully, or at least recognizing the situations and deciding how to deal with them, is to watch for signs of how employees take direction. If you forget to observe and listen to employees, you will lose opportunities to get effective feedback from them.

When you do listen and observe, you will be able to determine how the staff is taking direction. This can be done at the same time that you monitor your staff's progress toward achieving their predetermined objectives.

5. *Decision making.* Employees need timely and clear decisions on questions that affect their jobs.

For example, a university development officer assigned to the school of engineering wanted to create a separate alumni organization for engineering alumni. Since this move would signal a change in policy for the university, it required a senior management decision. But the vice president for development deliberated so long that several engineering alumni became angry and disgusted. The engineering dean was frustrated, and the development officer became discouraged and demoralized. All of this could have been avoided if the chief development officer had made a timely decision.

6. *Effective delegation.* You must divide up responsibilities and delegate them to the staff. Once the work is delegated, however, you must give your employees the opportunity to do their jobs. Try to establish a means to monitor the process without insisting on hourly reports or constant checks to make sure the task is being done a specific way.

Rewarding good work

To motivate employees, you must create a favorable work climate, develop an effective personal style, and then recognize and apply certain rewards.

As I've said, people work best when there is harmony between their need for satisfaction and the institution's objectives — but these needs vary from person to person. To be an effective manager, you must make sensitive use of the following rewards:

1. *Money (including salary and fringe benefits).* How important is salary in motivating development professionals? Obviously, salaries must provide adequate income to pay the bills. But because we selected a service profession, we accept the fact that salaries are restricted by the nature and policies of nonprofit institutions. In fact, we all know highly motivated development professionals who have labored for years without strong regard for their salaries.

Nevertheless, pay is important and should be distributed carefully according to employees' talent and experience and your institution's location and financial situation.

Fringe benefits are probably not motivational in character, although the absence of the usual package of such benefits as hospitalization, retirement, or tuition remission will cause dissatisfaction. As a result, it's necessary to provide a competitive benefits package to meet employee expectations.

When salary inequities exist within an institution or department, the chief development officer must strive to correct them. A colleague of mine struggles each year with the president of his institution to close the gap between salaries for men and women. He's not getting instant results, but the situation is improving. The point is, the effective manager will work to improve situations that are not fair rather than accept things as they are.

Many institutions pay lip service to merit raises, but few have enough money to do a great deal. Nevertheless, strive to recognize good work by giving merit raises whenever possible. Even a small salary increase will indicate that you appreciate good work.

2. *Recognition and praise.* All of us want to be recognized for our efforts, and that's why you need to know how to give sincere, positive attention. Frequently (and rightly so) volunteers are recognized as the main people who make things happen. Meanwhile, development professionals sit in the background, knowing that their efforts really brought about success. So be sensitive to situations in which you can highlight an employee's efforts. For example, if the director of the annual fund does a great job, ask the president to send him or her a thank-you note.

Other places to recognize good wor' might be in an appropriate newsletter or at a public event, such as the annual meeting of faculty and staff. Whatever the method of recognition, we all need to know that our work is appreciated. If you take time to offer appropriate praise, you will have a much more motivated staff than if you never offer encouragement.

3. *Status.* For some, status is a strong motivating force. A job title, for example, can have either positive or negative

status. The chief advancement officer must have a suitable title for a senior officer, one that reflects the fact that the job is as important to the institution as the head of academic affairs, the business office, or student affairs. A popular title today is vice president or senior vice president. Within the advancement program, titles must also be clear and fair. If everyone is called director regardless of reporting relationships, then the title loses its status.

Office space also implies status. For instance, a corner office is usually thought to be more desirable than one in the middle of a building. Windows, too, say something about an employee's lot in life. You must allocate space to those employees who deserve the status. If you don't, your good employees will feel unwanted and unrecognized in comparison to others on the staff.

4. *Advancement and promotion.* At larger universities, you probably have the potential to build vertical structures in which employees can be promoted as their work justifies it and positions become available. At smaller colleges, there may be little room for internal advancement. If, for example, the vice president is 40 years old and looks healthy, the aggressive director of public relations will realize that to become a vice president, he or she will have to move. Some of this mobility is inevitable, but you can sometimes avoid it by being sensitive to other means of keeping good people, such as giving appropriate recognition, title, office space, and of course, merit raises.

In my judgment, too many people in our business move for little or no real gain in status or salary. They move because they're frustrated and feel that their work is not appreciated. If presidents and vice presidents would show genuine appreciation for their employees through praise and recognition, many people would decide not to change jobs. Keeping them could be as simple as saying, "Pat, we need you, and we don't want you to go," instead of, "Well, Pat's made up her mind, so let's get her out of here as fast as possible."

5. *Negative forces.* When rewards fail, you must be prepared to use negative factors such as criticism or even threats of demotion or job loss.

When you're criticizing an employee's performance, however, keep two things in mind. First, criticize the work, not the person. Second, make the criticism at the time of the mistake. Don't let mistakes pile up and then, when you can't stand it anymore, suddenly explode. Take the employee aside and point out what's wrong. Be specific. Have the employee repeat what you've said to make sure you both understand the problem.

When all else fails, putting pressure on an employee through threats of job loss or demotion may make a difference. But these threats must be made judiciously and cautiously. The time to use them is usually when you've exhausted all other motivational techniques and accepted the fact that the employee is probably not going to be part of your organization much longer.

Motivating yourself

Obviously, becoming an effective motivator isn't easy. It takes time, sensitivity, judgment, and a certain willingness to admit that your way isn't necessarily the right way all the time.

Even so, your employees are not the only ones who will benefit from your earnest efforts to be a better manager. Satisfied, motivated employees are the key to any operation's success — and success for your operation means success for you, too. That fact should go a long way toward helping you to motivate yourself. CASE

ARE YOUR PLAYERS READY FOR PRIME TIME?

Teamwork boosts a staff to peak performance

BY ARTHUR V. CIERVO

When the troop transport left Yokahama, my assignment was to get about 30 soldiers to clean the ship's heads. This was one of the nastiest jobs aboard ship, and the fact that the soldiers had to take orders from a young Air Force sergeant didn't make the chore any easier.

To get them to cooperate, I used a low-key approach. "Let's work together to get the job done well enough to pass inspections," I said. "Then we can all go on deck and relax."

Later, an old Army sergeant, noticing how diligently the men were working, took me aside and said:

"I'm amazed that you can get those guys to do anything. They served under me for two years in Japan, and I found them to be nothing but a bunch of gold-brickers. Guess the secret is to *ask* them to do the work, then work with them in getting the job done."

The Army veteran had discovered something that I had learned instinctively and that management experts learned after years of research: Teamwork achieves high productivity.

Workers simply won't give 100 percent to autocratic managers who exhibit little interest in worker concerns. Leadership by example is still the best form of leadership.

W. Edwards Denning, the American statistician who taught the Japanese how to be productive, noted in the 1940s that the problem of productivity is 85 percent management's and 15 percent employees'.

Thanks in part to good management, the Japanese have become world leaders in quality and productivity. To compete effectively with them, we Americans are reassessing our management styles in business and industry. Government and nonprofit organizations, also pinched by tight budgets, are taking productivity seriously. Governor Mario Cuomo of New York, for example, has appointed an assistant to the governor for management and productivity.

To my knowledge, there are not as yet vice presidents of productivity in academe. But in recent years, colleges and universities have come to realize that productivity doesn't apply just to assembly line workers, sales clerks, and football coaches. Words like "quality circles" and "participatory management" are becoming a part of the lexicon of administrators on campus.

Quality circles, a management technique that Denning taught to the Japanese, operate on the theory that a group of workers from the same general area should spend a specified amount of time brainstorming ideas to improve quality and productivity. The group might spend an hour a week in such sessions.

Will this concept work on campus?

"It's easier and more effective to implement quality circles in an academic environment of openness than in industry," says Kenneth R. Graham, director of executive programs in Penn State's College of Business Administration. "Management of subordinates in a college is done more cooperatively, professional to professional, rather than having to rely on the authority of the more rigid hierarchy found in industry."

In our public information department at Penn State, we are using quality circles with success. One circle, consisting of four secretaries and an administrative aide, held its first meeting in December with one person serving as coordinator. The coordinator's instructions were:

- don't dominate the discussion;
- don't tell the circle participants what to do or what not to do;
- do your best to stir up thinking;
- prevent the discussion from becoming a gripe session.

The group met for one hour and agreed that the session was highly useful. For example, we learned that the secretaries wanted more frequent feedback from managers about their performance and wanted them to communicate instructions more clearly. We are correcting both problems and have extended the use of quality circles to other areas.

Another management technique gaining favor in the business world is called "quality of work life" (QWL). Basically, this is a process by which all employees are given some say about the design of their jobs and the total work environment. Employees are encouraged, through channels of communication set up for the purpose, to offer suggestions for improvement, to ask questions, and to voice criticisms. Such an approach may enhance the self-esteem of employees and reduce their feelings of powerlessness. These are psychological pluses that could lead to increased productivity.

A note of caution: QWL is not democratic management. The manager must make office decisions based upon input from a variety of sources, not just the opinions of the staff. Sometimes it is more useful to get this input from a consultant or a professional colleague.

What quality circles, QWL, and similar techniques underscore is the fact that management is the art and science of getting things done through people. "If you want to know how to

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increase productivity on a certain job, ask the worker who's doing it," says George Sadler, senior economist for the American Productivity Center in Houston, Texas.

Employees need — and want — direction from their managers. Each manager has his or her own techniques, but I'd suggest these six steps to make your program productive:

1. Establish goals.

Peter Drucker was right when he wrote: "Concentration is the key to economic results... no other principle of effectiveness is violated as constantly today as the basic principle of concentration.... Our motto seems to be 'Let's do a little bit of everything.'"

Goals help us to keep our programs in focus. Most institutional relations operations have two goals in common: raising money and helping to recruit students. You can identify others specific to your institution through careful reading, personal observations, discussion, and good listening. Once this is done, you can set priorities.

A. H. (Bud) Edwards, vice president for institutional advancement, has established a strong management by objectives (MBO) program at Buena Vista College. The objectives center on fund-raising targets that are measured not only in dollars but also in activities, such as letters and visits to potential donors.

"We use a yearly plan booklet, which lays out the entire management by objectives program for a year," says Edwards. "Included are soul-searching answers to such questions as, What am I going to do, how am I going to do it—and how do I know I did what I said I was going to do? The last question is the evaluation. Priorities are then established.

"Each week staff members submit a simple form to me listing what they have accomplished," Edwards continues. "I then spend five minutes a day with every staff member to see what I can do to help him or her reach certain objectives. If a staff member didn't accomplish a particular objective, we analyze the reasons why and try to come up with a solution to any roadblocks encountered along the way. We increase our productivity by learning from each mistake."

Whether you have a structured program or not, you should always ask yourself one question when someone requests your office's services: Does this project get me any closer to my goal? That question can save you a lot of trips, telephone calls, unnecessary work, and time at meetings.

2. Communicate expectations.

Some people are low on the productivity scale because supervisors do not require them to do enough. No one ever challenges them to accept a heavier workload, to pick up the tempo, to do more. This, alas, is all too often the case, even though experts usually agree that most people produce at about 60 percent of their capacity. It is up to the manager to create a climate that encourages increased productivity.

Challenge a person to do more by increasing his or her workload. Then work with that person on how to handle it most efficiently. Crucial to this strategy are good management and organizational skills. When a person increases the amount of work he or she can do in a day, morale goes up. As John Cotton of Purdue's Krannert School of Management puts it, "The more productive a worker is, the happier he [or she] tends to be on the job."

Do you want your director of annual giving to increase donations by 25 percent this year? Or your news bureau manager to get more stories in the *New York Times*? Does the quality of your student recruitment publications need to be improved? If so, communicate those expectations to your staff concisely and clearly.

3. Delegate responsibility.

In spite of his failure to mention good women, Theodore Roosevelt once offered good advice on delegating: "The best executive is the one who has sense enough to pick good men to do what he wants done, and self-restraint enough to keep from meddling with them while they do it."

Studies show that independence encourages people to be more creative and productive. Yet poor managers want to do most of the work themselves. They want no suggestions, no criticism, and no help of any kind. As a result, these supervisors cram 60 hours of work into a work week, and their employees spread 30 hours of work over the same week.

Do not, however, loosen the reins too quickly with new employees. A long leash allows the person to cover a lot of territory, but it may also lead to trouble. In one operation, a new director of development was immediately given the responsibility of picking his own staff with little direction from the vice president. Unfortunately, the director was a bad choice, and he, in turn, hired many ineffective people. This management mistake set the capital campaign back a year.

4. Insist on accountability.

Measuring performance is a must in institutional advancement. Usually we keep a scorecard on dollars donated, count column inches of copy, or check the enrollment figures. There are, however, many other effective ways to measure results.

For example, Kent Dove, Drake University's vice president for institutional development, holds employees accountable through a plan of action listing goals and objectives. "Setting a dollar goal is sometimes unrealistic," he says. "Sometimes it's better to set an activity goal." He assigns staff members a certain number of face-to-face solicitation calls each week. They record results of their efforts in a weekly report.

"We are careful in the process not to get away from the volunteer concept," says Dove. "Even though we are staff dependent to a degree for fund-raising solicitations, we also realize that a

volunteer who is involved is a more generous contributor."

Appropriate budgeting of staff time and dollars is also important for achieving production goals. "Without enough resources, we can't be as productive as we need to be," he says.

"Overall, our philosophy is that, if you engage in the right kind of activities — including making solicitation calls and servicing volunteers — dollars tend to come in. It is amazing that in development work there are a number of people who entertain and cultivate well, but they don't ask for gifts."

5. Conduct regular evaluations.

Two-thirds of employees want feedback on performance regularly — no less than twice a year. A study at General Electric showed that the annual employee review had little development value, primarily because criticism did not usually lead to improved performance. However, the study revealed that goal-setting, combined with day-to-day coaching on those goals, consistently improved an employee's performance.

Employees want to be judged on standards, not "hunches." Some questions you may ask yourself in evaluations are:

- Does the employee participate in professional development activities after work?
- What has he or she actually produced of high quality?
- Does he or she do right the things he or she undertakes?
- How productive is this person?

Once you have the answers to these questions, you can set standards for evaluating your employees.

6. Provide positive reinforcement.

To obtain good results, a manager, like a good football coach, needs to strike a balance between being a critic and a cheerleader. Your criticism should be constructive; your cheerleading, inspirational. You can accomplish both by providing plenty of positive reinforcement.

To increase productivity, C. Jackson Grayson, Jr., founder of the nonprofit American Productivity Center, encourages managers to give employees the three Rs: *recognition, responsibility,* and *rewards.*

Each manager has his or her own way of recognizing good performance. At Penn State, I write a personal letter, thanking employees for their contributions on the anniversary dates of their employment. I also highlight outstanding performance by mentioning the employee's work in a typed, one-page flier that our office circulates periodically to all staff members.

Another of our programs, called "Think Time," encompasses all of the three Rs. Once a year, each employee stays at home for a day to think about how to make the public information department more effective and efficient. Their suggestions have made the operation more productive, and in the process, it has brought them recognition and rewards.

What industrial psychologists say, then, is true. Employees really do productively support what they help to create. CASE

THE PRODUCERS

Improving productivity the Westinghouse way

BY MARY ANN AUG

When Robert E. Kirby talks about productivity, industry listens. That's because Kirby is chairman of the board and chief executive officer of Westinghouse Electric, a $10-billion corporation with 140,000 employees in 42 countries. In 1981, a year when America's output per work-hour grew by a mere 0.4 percent and even Japan's increased by only 3.7 percent, Westinghouse's output per hour grew by 4.5 percent.

Mary Ann Aug is director of the Department of News and Publications at the University of Pittsburgh, a state-related institution with 35,000 students.

Kirby's advice applies to CASE member operations as well. As chairman of the board of trustees of the University of Pittsburgh and a leader of Pitt's five-year, $50-million capital campaign, he's no stranger to either education or the field of institutional advancement.

In a time when education must fight for every available dollar, what he has to say is this: "You must reexamine the way you do everything, just the way we do in industry, and bring your methods into the technological age."

In other words, to beat the budget squeeze, improve productivity. Higher productivity is essential if advancement officers are to meet their goals at constant or even decreased costs.

Commitment to productivity

One thing higher education can learn from Westinghouse is that everyone in an organization must be dedicated to productivity. At Westinghouse, the commitment is evident on all levels, not just on the assembly lines of its manufacturing divisions.

"We're talking about improving productivity throughout our entire organization, top to bottom," Kirby says. That includes managers and white collar workers who have needs and problems similar to their counterparts in education.

One of the people in charge of white collar productivity at Westinghouse is Ken Kilderry, head of the Operations

Analysis Department of the corporation's $10-million Productivity and Quality Center. The center develops, gathers, and tests the latest methods and technology and puts them to work in Westinghouse's companies and divisions throughout the world.

Kilderry's department works on six main areas of productivity improvement, ranging from making sure a department is set up to meet the goals of its strategic plan to dealing with "people problems" that interfere with productivity. The two areas with the most immediate application to institutional advancement are:

1. *Office automation.* Institutional advancement professionals are doing themselves a real disservice if they fail to take advantage of what a word processor or microcomputer can do for productivity, Kirby says. Lou Laffoon of Westinghouse's Operations Analysis Department calls the word processor "the first major improvement in clerical productivity since the invention of the typewriter." By eliminating the need to retype information in which changes must be made, word processors show the quickest productivity return in an office. And time *is* money. Departments that transmit copy directly from a word processor to an outside vendor's computerized typesetter may save up to 30 percent of typesetting costs.

2. *"People-sensitive" measurements.* Productivity measurement is a means of telling what kind of return a department gets on its investment of time and money. Most measurements of productivity deal with manufacturing output or productivity for an entire organization. White collar areas — such as institutional advancement — are hard to quantify.

Measuring is hard, perhaps, but not impossible with the help of Westinghouse's "people sensitive" technique. Its premise is that the people in a group or activity being measured know better than anyone else what factors can measure their productivity. Through brainstorming, the employees identify performance criteria and rank them in order of importance. The performance criteria are assigned numerical values according to their rankings. With some manipulation, these become baseline data against which management and employees can measure productivity within the department and detect upward and downward trends.

Kilderry suggests that this technique, which is much more complex than this condensed description implies, would be valuable in public relations, alumni relations, and other areas that are difficult to measure objectively.

Quality circles

Another technique that's adaptable to education is the quality circle. According to Kirby, a quality circle creates an atmosphere in which workers can say, "I think we're doing this wrong. We could do it better this way." The quality circle also provides a mechanism to ensure that such ideas find their way up to management.

According to Ralph Barra, head of Corporate Quality, quality circles give people who are underutilized or who want to take responsibility and be creative an opportunity to participate in problem-solving and decision making. As their name implies, quality circles are aimed at improving the *quality* of the work or product produced. But as the quality improves, so do productivity, morale, and the general work environment. Self-esteem, increased pride, and a sense of accomplishment reward the workers.

Making a quality circle succeed isn't easy, but the hard work pays off. The enthusiasm generated by the circles is contagious. People catch the spirit from each other, Barra says, as the rapid growth of circles at Westinghouse demonstrates. The company now has 1,700 circles involving approximately 17,000 people in several countries. And new ones spring up each month.

Productivity on campus

All this sounds wonderful, of course, but how can you apply such techniques to your own operation? The task is especially difficult since you would probably be adding these projects to an already heavy workload.

Kilderry believes it's impossible to accomplish much without outside help. That's why you should begin by having someone come in as a consultant to examine your operation and put together a plan. Such a consultant could come from your institution's planning office, a consulting firm, a business in your community, or your own faculty, perhaps from the business or psychology department.

Along with deciding to bring in the consultant (spending the precious money that will help you save money if need be), you must commit a specified amount of personnel time. Then, as Westinghouse does, you form a task force of internal and external personnel to tackle the various phases together, and you change contributing personnel according to the phases of your study. In addition to providing important information, your departmental task force members can ensure acceptance of change through their participation. They'll be committed to changes they help plan.

But there's another problem. Word processors, consultants, and freed staff and managerial time all cost money. Where do you get the funds for a special program?

Kirby brings his business perspective to this problem. "Higher education will have to fund it the same way business funds such things. If it's a productivity improvement project, it pays for itself very quickly. You should be able to pay for the expertise or equipment out of the savings the improved operations realize. Otherwise you shouldn't go into it. You don't buy a gadget for the gadget's sake. You buy it to get a good quick payback on it and to see your operating costs go down."

Regardless of how much money you decide to invest, Kilderry says, two factors will influence the success of any productivity techniques. First, the department or office must invite or wel-

come the study, techniques, or new equipment. Second, the people doing the work must be closely involved in the process of change at all stages. In fact, Laffoon says that involving the people who are going to use the system is the linchpin of successful planning and implementation.

Chances are that just talking about ways to improve productivity will make a difference. As Kilderry points out, "One of the most exciting things is that... the awareness or sensitivity to the whole problem of white collar productivity rises as each function and each activity become involved." Everyone in the organization becomes more productivity-conscious in all aspects of the job.

With the help of these advanced techniques, you can encourage quality-consciousness in your own operation. "The improvements in efficiency and productivity are so marvelous that you can do so much more, even though your budgets are not growing as fast as they once did," Kirby says. "I think this will be the saving grace for higher education in the '80s."

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GOING IN CIRCLES

How quality circles can enhance the quality of life around your office

BY LARRY ROMINE

Item: *Your news bureau is set up so that your photographers never cross paths with the writers whose stories they illustrate. When the photos turn out wrong—a frequent occurrence—the writers complain that the photographers don't know what they're doing. The photographers complain about all the time they waste reshooting assignments that they didn't understand in the first place.*

Item: *Your fund-raising office is still assigning donor contacts the way it did 30 years ago—even though your staff has doubled and your fund-raising strategies now include everything from massive direct mail campaigns to deferred giving seminars. The result: Several potential donors get overlapping appeals from different staff members, much to the donors' confusion and irritation. Others wonder why they never hear from alma mater.*

Item: *One of the secretaries in your alumni office is busy only two or three times a year, when a special event is coming up. The other is always swamped with correspondence, class notes, and records that need updating. You wonder—every now and then—why one is always doing her nails and the other is constantly biting his.*

If any of these situations sounds familiar to you, chances are your office could benefit from a problem-solving technique that's proved highly successful in increasing productivity in industry. The technique is a quality circle.

The premise of quality circles is simple: The people who do a job are in the best position to say how the job can be done most efficiently, pleasantly, and cost-effectively.

The simple premise behind it is that the people who do a job are in the best position to say how the job can be done most easily, efficiently, cost-effectively, and pleasantly.

In general, a quality circle is a group of five to 10 people who meet regularly—often once a week—to identify, analyze, and solve problems with the quality and quantity of the work they do. Once they've decided on a solution, they present their proposals to management and then put the proposals into action.

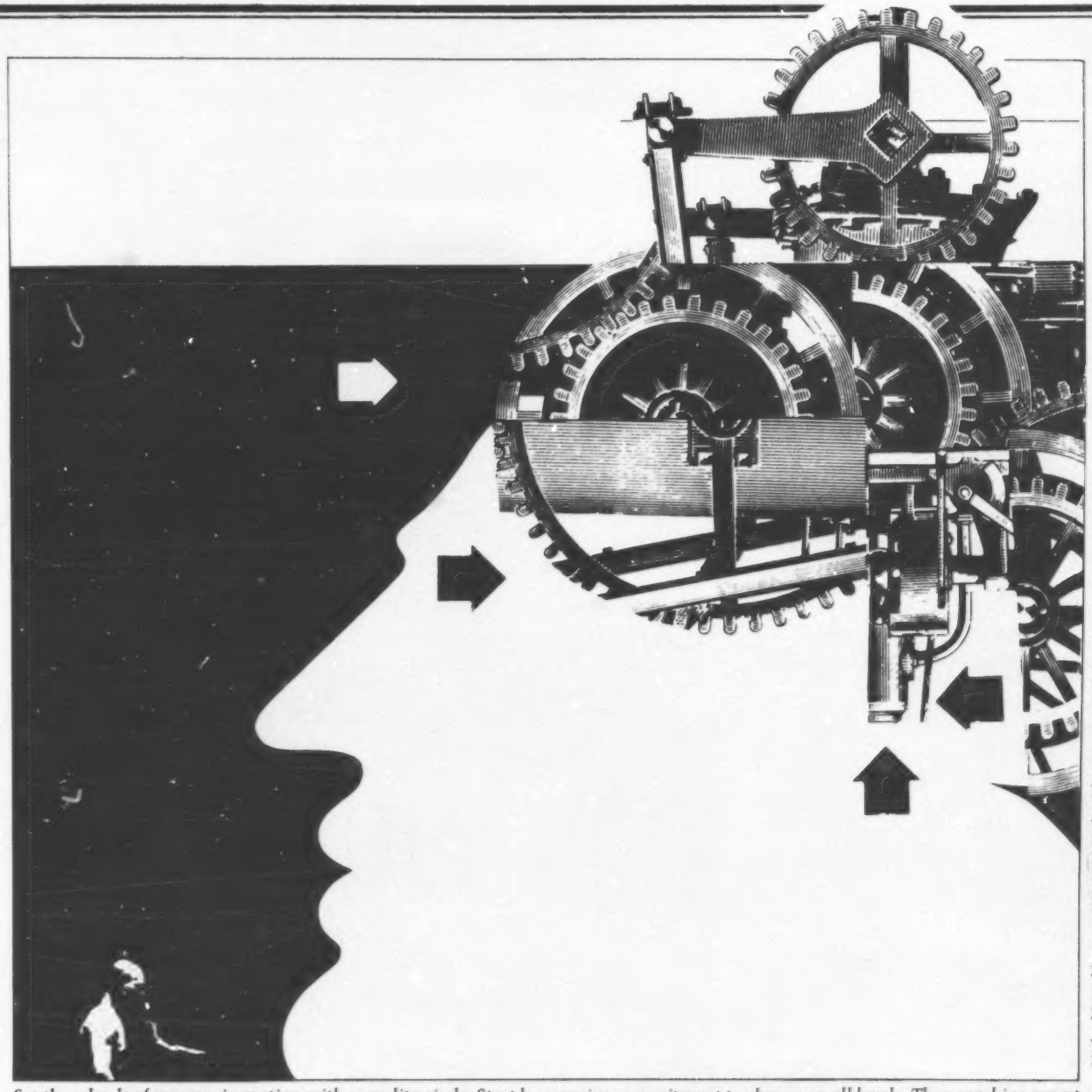
A variation on the quality circle structure is a *verteam*. It's different because a quality circle usually draws on people from one department; a verteam brings together people from all different organizational levels, janitors to department supervisors to chief executive officers. Members are chosen on the basis of their expertise in the problem area, and they work on a company- or campus-wide basis, not in one department. But their goal, too, is to find ways to improve the quality of their work.

Neither group is new to industry, although quality circles are better known. Made famous by their part in helping the Japanese raise productivity, quality circles are now in place at more than 750 American firms, including General Motors, IBM, Westinghouse, and American Airlines. While the concept is still very new in higher education, quality circles are gradually infiltrating everything from campus building service staffs to academic departments to advancement offices.

Lane Community College has been a leader in adapting industry's principles to higher education's needs. To give you an idea of what big results these little groups can have, here are examples of what they've achieved at Lane:

- A quality circle helped implement a curriculum review and development process for the Study Skills Center after its staff realized that courses were being added on whim, not according to a carefully thought-out plan.
- After finding that 60 percent of the college purchasing staff's time was spent processing orders for under-$100 items, a verteam studied ways to reduce the amount of time and paperwork de-

Larry Romine is director of college/community relations at Lane Community College. Lane is a two-year, public institution of 32,656 students in Eugene, Oregon.



Michael David Brown/ASHE-ERIC Higher Education Research Reports

Set the wheels of progress in motion with a quality circle. Start by securing commitment to change on all levels. Then combine expert advice with lively brainstorming sessions. The result could be a big improvement in the inner workings of your office.

voted to such small items. The solution was a bank card for Lane's budget administrators.

• A verteam worked out a centralized system of copy machines to replace a costly system with varying brands and maintenance needs.

• A quality circle developed a system to coordinate huge amounts of information about classes, instructors, registration policies, and more for the noncredit adult education department. The system helped organize and distribute information that had grown much too massive for one person to handle.

In all these cases, the changes did more than just save time and money (although that saving was often substantial). Most of the more than 200 people who have been in quality circles and on verteams at Lane report increased job satisfaction. They have learned more about how the college works, have a say in making it work better, and have gained an opportunity to think and act creatively. In other words, they've earned a stake in their work.

Setting up a quality circle

A quality circle or verteam can also have positive effects on institutional advancement offices. Each office will have different situations and needs, of course, but here are some general steps to follow in setting one up.

1. *Educate everyone below and above you.* A quality circle or verteam won't work without commitment from both top management and employees at all levels. The process takes time, thought, and creativity. The results will

mean changes. But both individual employees and the organization as a whole should improve.

2. *Start with the help of experts.* Some corporations hire consultants to set up and start their quality circles or verteams. Others send individuals or teams to special training sessions. If your quality circle will be for your office only, chances are your group leader (or facilitator, as he or she is often called) can rely heavily on self-education. Several books and associations can provide a wealth of information about how to set up a quality circle. (A list of good ones follows.)

If your office decides against getting professional help with its quality circle, keep in mind that your facilitator must *want* to do the amount of work it takes to make the circle succeed. His or her commitment is especially crucial.

3. *Use a variety of techniques to identify problems and find creative means to solve them.* One technique to start off with is brainstorming. What are some problems — with office layout, with work distribution, with anything you can think of—that might be solved with some thought and innovation within the department? As you think the problems through, imagine what the best solution would be and what steps are necessary to get to it.

Acquaint yourself with the different sorts of situational analysis. If you need to find more cost-effective ways to do mailings, for instance, chances are you need to gather relevant statistical data about the way you do your mailings now compared to alternative ways to do them. Cause and effect analysis, through which you examine machinery, staff, methods, and materials to see how efficiently they do their work, can also help you pinpoint places where your office systems break down.

Again, reference books can help you identify the means of analysis that best suit your needs. Then staff ingenuity can help you come up with creative solutions to your problems.

4. *Carefully tailor the way you present your solutions.* Some of your quality circle's changes can probably be accomplished on a small scale without outside approval. But if your circle's proposals must be cleared with a department head or even the department head's boss, your success will depend on how convincingly you can sell your proposal to management.

It's important to think hard about the ways in which your proposal can make your department or even your institution more successful. Point up these ways as clearly and forcefully as possible. Four words that will always make a boss's eyes light up are: "This will save money." Four other effective words: "This will save time."

Be patient

As useful as quality circles and verteams can be for improving an institutional advancement office's productivity, you aren't likely to see instant results. At Lane, employees had been contributing to the decision-making process for years before we established quality circles.

We hired an experienced quality circle management consultant to introduce the theory to managers and staff leaders and to train facilitators, who in turn trained circle members. The consultant also helped set up a steering committee of teachers, administrators, and support staff and establish a college productivity center with a full-time staff. The community relations department cooperated with the center in publishing a quarterly devoted exclusively to staff ideas about productivity.

Our board provided clear and emphatic support from the start, and our president, whose idea it was to emulate industry's productivity techniques, ordered the productivity center established and found the money for it.

Nevertheless, adapting an industrial model to an educational setting requires much trial-and-error testing and results in some frustration. After all, we in education deal with intangibles, not widgets on an assembly line. On the practical level, spring, summer, and Christmas breaks can slow down the momentum of even the most energetic quality circles. Part-time or student labor may not want to get involved to the extent that full-time staff does. And change of any sort always takes time.

Even so, that time can pay off in a news bureau where the photographers and writers communicate, a development office in which donors are approached systematically, and an alumni office in which the workload is even year-round. Quality circles can make just that big a difference in the quality of life around your office. CASE

For more information

Romine recommends these sources:

Organizations

The Quality Circle Institute
P.O. Box Q
Red Bluff, CA 96080

The International Association of Quality Circles
P.O. Box 30635
Midwest City, OK 73140

Readings

Crosby, Philip B. *Quality is Free.* New American Library, P.O. Box 999, Bergenfield, NJ 07621. $4.95 including postage.

Dewar, Donald L. *Quality Circles: Answers to 100 Frequently Asked Questions.* The Quality Circle Institute, P.O. Box Q, Red Bluff, CA 96080. $3.25.

———. *The Quality Circle Handbook.* The Quality Circle Institute, P.O. Box Q, Red Bluff, CA 96080. $60.

Hinrichs, John R. *Practical Management for Productivity.* Van Nostrand Reinhold, Customer Service Department, 135 West 50th Street, New York. NY 10020. $9.95.

"Improving Productivity: A Public Relations Opportunity," a report published by *Public Relations Reporter,* P.O. Box 600, Exeter, NH 03833. $20.

Thompson, Philip C. *Quality Circles: How to Make Them Work in America.* American Management Association, 135 W. 50th St., New York, NY 10020. $15.95.

PRESTO CHANGO!

Watch us change a student into a PR assistant

BY JENNIFER HAMLIN

In any campus public relations or publications office, student writers and photographers can generate more than their fair share of annoyance, frustration, and wasted mental energy. Happily, a lot of these problems are avoidable.

What isn't avoidable is the fact that working with students takes time. Motivating them to do the kind of job that truly benefits the public relations office takes even more time. Few of us have time to spare, so why bother hiring, let alone inspiring, student staffers?

One answer is obvious. Because they work for minimum wage (or less, through work-study programs), students are a cheap, readily available labor source. Another answer is less apparent sometimes but just as important: With careful cultivation, students can help an office accomplish more and can relieve the professional staff of mundane tasks. And they provide a vital link to that wide world beyond the administration building.

Of course, these benefits don't reduce your initial time commitment a bit. So before you hire your first student worker, ask yourself these questions:

1. *Do you like students, not as a group but individually?* If you don't enjoy working with young people, consider finding someone else to manage the student work force. There's no institutional benefit in deliberately making yourself miserable.

2. *Can you accept the dual role of employer and teacher?* To the students, of course, you emphasize the employer-employee relationship. But most students are raw beginners, and you will undoubtedly have to teach them to give you what you want.

3. *What quality of work will you accept?* Most of us want universal excellence — incisive news stories, sparkling features, photos worth at least several thousand words. But not all work requires excellence, and few students can or will produce it at the start. Identify the less demanding projects ahead of time, and determine an acceptable level of performance. This will help you avoid redoing a lot of work and discouraging your workers as well.

4. *What benefits do you have to offer?* There's employment, of course, something few students take lightly. But, on a small campus especially, you can also offer status within the student community. Most important of all, you can provide your student workers with professional experience. The more you enhance that experience, the more your time investment is likely to pay off with today's career-oriented students.

At Adrian College (enrollment 1,222), our decision to increase our use of students writers, photographers, and broadcasters was linked to staff reductions in the Office of Publications and Information. Having previously employed a few students haphazardly, we designed a new program and hired a dozen workers, freshmen through seniors, as our student publicity staff.

We had a few dropouts along the way, but in general, the program worked. Most of our student staff members have developed into dependable promotion assistants.

Based on our success with that program and the lessons we learned, here are some suggestions for generating quality performance from members of your student staff.

1. *Seek talent.* Don't simply accept students who are assigned to your office because of their vague interest in creative writing or high school yearbook work. Hire the best. At Adrian, we distribute a midsummer employment notice to all students. The notice requests introductory letters (no résumés), writing or photography samples, and references, all on short notice. This helps us identify applicants who can communicate effectively.

2. *Cover the basics once, for everyone.* Instead of waiting for the semester to begin (when no two students are free at the same hour), we invite our student staff to return to Adrian early. In three days, we cover what we do; how we do it; technical skills; and office goals, rules, and procedures.

3. *Generate esprit de corps.* Performance usually improves when students feel they're part of an important group effort. The shared experience of the presemester seminar gives our students a group identity, which we try to maintain with regular staff meetings and occasional social events.

4. *Provide a work space, however small.* Our students do most of their work outside the office, but they need a place for rewrites, phone calls, and occasional hanging-out. In our office, a corner with two desks and chairs, reference materials, one typewriter, and one telephone is enough for 12 students.

5. *Establish a communication system.* Many types are possible, including specific assignment days, regular office hours, or planned appointment times. Whichever system you choose, make sure you see people often enough to get the job done. Our students stop in several times a week to pick up messages and assignments from folders mounted on an office bulletin board.

6. *Be dependable and consistent.* Set the rules and stick to them. Apply acceptance standards fairly. Hold fast to deadlines, and return edited material when you say you will. Explain editing changes and rewrite instructions. (Occasional editing *with* the writer helps.)

7. *Gauge assignments to encourage individual growth.* Don't ask a student who hasn't conquered interview shyness or learned to write lean-and-clean prose to produce an in-depth feature. If the final story is edited beyond recognition, it will discourage rather than inspire the writer. Assign challenging but manageable projects. Remember that interviewing will be a problem for most students at the outset, so start with simple phone interviews and fact-gathering.

8. *Offer recognition.* Give bylines and photo credits when you can. Post clippings. Identify your staff to your faculty, administration, and community. For their first assignment during the pre-

Jennifer Hamlin is acting director of publications and information at Adrian College, a private, coeducational institution of 1,222 students in Adrian, Michigan.

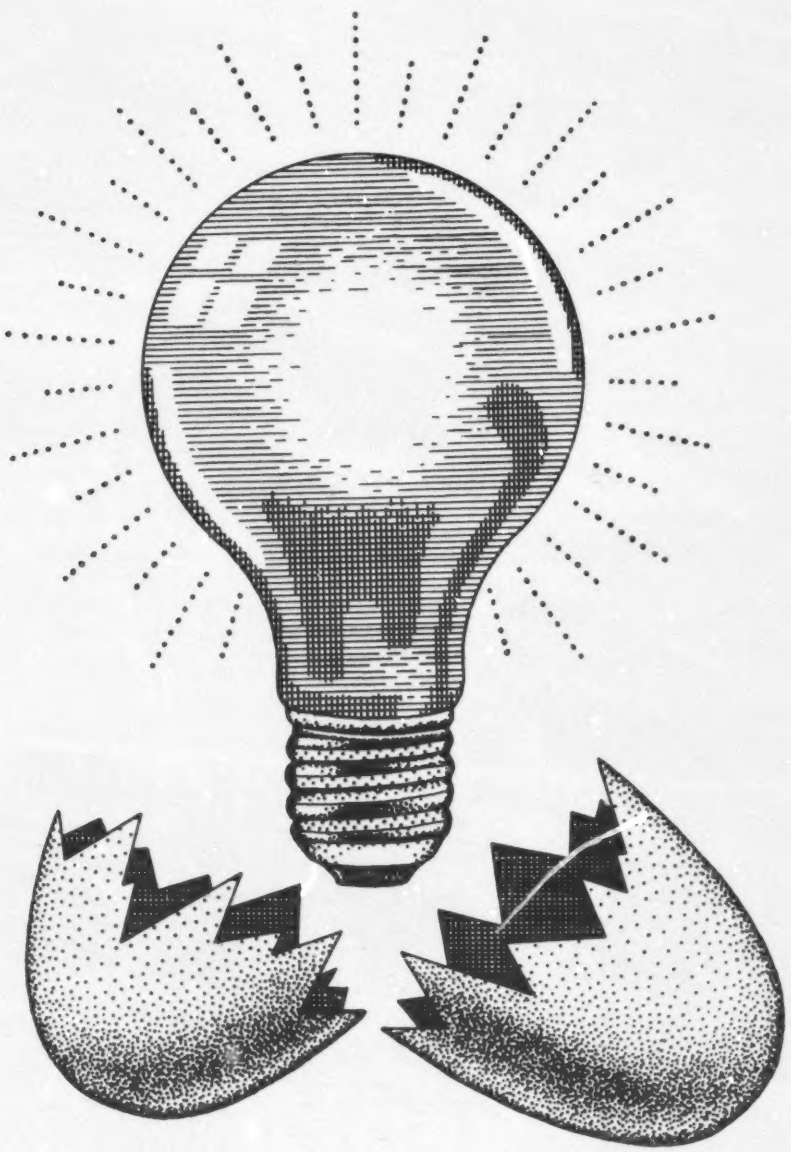
semester seminar, our students write news releases to send to each other's home town papers about their appointments to the staff.

9. *Encourage professional development.* Involve students with major speakers. Arrange for them to sit in on meetings with media representatives to see how the pros do it. Midway through the year, we sponsor a photography workshop for staffers who want to improve their darkroom technique.

10. *Confront dissatisfaction.* Unhappy people cause unrest. Invite suggestions and criticism, and respond with an open mind. Deal with discontent, or you will deal with its results.

How you organize your workers' responsibilities will depend on your institution. At a large research university, the familiar beat system may work well in keeping all the news covered. On our campus, a mixture of project assignments (such as overall promotion for a major event), a few beats, and general assignment works better. In any case, encouraging students to take initiative is the secret of making the program beneficial to *you.*

By giving your student work program plenty of care and commitment, you can turn student workers into involved, enthusiastic, cost-effective public relations assistants. At a small college, the program can also contribute to positive community spirit on campus. So be patient. Not all the rewards are immediate, but the investment of time and energy does pay off. CASE



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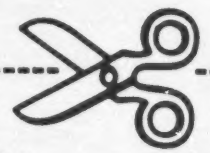

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